



INDIANA
WORKFORCE
DEVELOPMENT
AND ITS **WorkOne** CENTERS

FORMAL COMMUNICATION

TO: Indiana's Workforce Investment System

FROM: Dennis Wimer, *DW*
Deputy Commissioner, Field Operations

DATE: August 31, 2012

**Technical Assistance Bulletin
TAB 2012-02**

**Implementation of Reemployment Services and Reemployment and Eligibility
Assessment (REA) Activities for 2012 REA Grant-Funded Programs**

Purpose

To issue instructions to One-Stop Operators, Regional Operators, Local Office Managers, and Reemployment and Eligibility Assessment/Worker Profiling Reemployment Services (REA/WPRS) Coordinators on the requirements and implementation of the 2012 REA grant-funded program changes. These changes were announced in Unemployment Insurance Program Letter (UIPL) 10-12 for the provision of reemployment services and reemployment and eligibility assessments to individuals who began receiving unemployment compensation benefits.

Content:

The current Reemployment and Eligibility Assessment (REA) profiling program provides (at minimum) the following required services to targeted claimants:

- Orientation
- Assessment
- Individual Reemployment Plan (IRP)
- Claimant-Centered Labor Market Information
- Referral to Self-Directed Job Search
- Additional services (job search workshop, job search assistance, employment counseling and referral to other services)
- UI Eligibility Review

Currently, an REA-profiled claimant must complete one job application each week while looking for work (job search) at two different places of employment, and report these contacts each week on their Unemployment Insurance (UI) voucher completed in Uplink. Claimants are

notified by letter (see Attachment A) of the requirement to attend REA orientation. At REA orientation claimants learn the mandatory components of REA participation and about the many services offered at the WorkOne center. A Self-Assessment form and Work History/Contact sheet (Attachment B) will be enclosed with the REA orientation notification letter. The claimant will be instructed to return these forms completed at REA orientation. A sign-in sheet (Attachment C) must be utilized for documentation of participation in REA orientation.

One-on-One Assessment Interview

All REA-selected claimants shall meet in person with the REA Coordinator and will register on Indiana Career Connect (ICC), and may be enrolled in Wagner-Peyser (W-P) and Workforce Investment Act (WIA) program services, as indicated by individual need. Each REA-selected claimant will participate in a one-on-one assessment interview (Attachment D) and assist in the creation of an Individual Employment Plan (IRP)(Attachment E). Based on the initial assessment results and expressed next employment needs of the claimant during preparation of the IRP, the claimant will be scheduled for the next available appropriate service. Each region has a product box of services which includes, but is not limited to: job search workshops, job search assistance and employment counseling.

Claimants must meet the requirements of DWD Policy 2011-04 entitled, "Continuing Eligibility Requirements for Regular State Unemployment Insurance Benefits" revised October 7, 2011. This policy outlines the requirements for continued eligibility, the consequences for failure to comply with each requirement and the circumstances under which a claimant may be excused from compliance with requirements. The requirements for continued UI eligibility are:

- At a minimum, for the duration of the claimant's UI benefit year, a claimant must register and maintain work registration in Indiana's job matching system, ICC.
- All claimants must report to WorkOne, be able, available and actively seeking full-time work for each week UI is claimed.
- Each claimant's efforts to secure full-time work must include the submission of at least one job application and a search for two additional positions during each week in which the claimant files a weekly claim for UI benefits.
- A claimant must apply for suitable work and must accept any offer of suitable work made to the claimant. Suitable work is varied based on the claimant's work experience, training, and duration of the claimant's unemployment.

Claimants are made aware of these UI eligibility requirements and the consequences for Failure to Participate (FTP). Indiana's unemployment benefits automated UI registration and filing system, "Uplink," notifies claimants of all issues, including FTP.

REA participants will also be required to maintain and submit a Bi-Weekly REA Participation log (Attachment F) to their REA Coordinator. This log will document their weekly work searches and also includes two additional job search-related activities per week such as: WorkOne workshops attended, skill assessments completed, networking event participation or volunteerism, career research, job shadowing, reverse interviews, or Self-Help- (Adapting to Change, Motivational, Career Exploration, or Job Search-related, etc.) related books/videos/or websites. REA participants are required to participate fully with all REA requirements until

either all UI benefits (including Extended Unemployment Compensation (EUC)) are exhausted or they find full-time employment and are no longer collecting unemployment benefits.

The claimant will be made aware of his/her responsibilities throughout the REA program and also will be made aware of the consequences for failing to participate in services which were agreed upon during the preparation of the IRP. The IRP will also include personalized information, and program and service needs discussed between the claimant and REA Coordinator.

Assessment Process

Step One

The assessment process is a key component of the REA program. Indiana's assessment process for the REA program may include a work readiness assessment utilizing the Worldwide Interactive Network (WIN) to assess the claimant's competency levels in basic math, locating information, and reading for information. The State of Indiana will make available WIN, a self-help re-mediation program for basic skill enhancement. WIN provides a comprehensive learning system for common skills required by all jobs, and can be facilitated or self-administered. WIN is available in all WorkOne centers in Indiana, Ivy Tech Campus' and on the Internet at no cost to the claimant. The WIN system includes targeted, self-paced instruction, pre- and post-assessments, a complete learning management system and an occupational job profiles database. These components can be used to help claimants learn, practice and demonstrate the skills they need to succeed in the jobs and careers they desire.

Claimants with lower educational attainment levels who have difficulty utilizing WIN or who have low initial scores will be required to attend Adult Education (AE) orientation. In addition, claimants who self-disclose a need for remediation will also be referred to AE orientation. All claimants referred to AE will be required to complete the TABE Survey assessment to determine if they would benefit from Adult Education services. If it is determined by the results of the TABE assessments that the claimant needs AE services in order to find meaningful work, WorkOne staff will encourage that AE services be included in their IRP. Once it has been included, WorkOne staff can hold the claimants accountable for making progress but not require the claimant to complete their GED as that may not be possible based on the length of the claimant's UI claim.

Should the claimant NOT agree to attend AE orientation, then an initial UI Participation Failure-issue will be entered and the adjudication process will begin to determine continued UI eligibility.

Step Two

A one-on-one review between the REA Coordinator and the claimant regarding self-assessment, work history, educational attainment, interests and employment prospects is the second step in the assessment process. This review will serve as the basis of the IRP.

Step Three

Part Three of the assessment process consists of an in-depth review of the claimant's skills, knowledge and abilities using the most appropriate assessment techniques. The goal will be to

identify specific skills needed to meet acceptable levels of work-based skills for enhancing re-employment possibilities. Claimants, who will be referred to Case Management for additional services, may be assigned to complete the Indiana Career Explorer (ICE) assessment prior to their initial appointment with the case manager.

Failure to Report for an REA Service

Claimants are notified of the REA orientation by letter printed on WorkOne letter head. The letter will include the name of the REA Coordinator and contact information including telephone number. The REA notification letter is sent to every claimant scheduled to attend a REA orientation session and includes an explanation of the consequences which may occur for failure to participate in the REA program. If the claimant misses their **first initial group orientation**, they will automatically be rescheduled for orientation, and a Failure to Participate (FTP)-issue will be entered into Uplink.

Procedures to follow concerning FTP issues are provided:

- On the first miss of the **initial group orientation**, documentation should be sent to the Data Capture and Imaging Unit for archival purposes to support the FTP-issue decision. This will include:
 - A copy of the letter mailed to the claimant to schedule the orientation; and
 - The sign-in sheet from the missed orientation.Create a FTP-issue in Uplink. Enter the date of the missed orientation session and explain why the issue is entered.
- On a missed WIN, Quick Guide, any agreed-to-workshop or any other agreed upon service, as scheduled, the following documentation supporting the decision should be sent to the Data Capture and Imaging Unit for archival purposes:
 - A copy of the signed Individual Reemployment Plan (IRP); and
 - The copy of the sign-in sheet from the agreed upon service.Create a FTP-issue in Uplink. Enter the date of the missed activity and explain why the issue is entered.
- REA Claimants are required to look for three (3) places of employment each week. If they fail to do so, a work search-issue must be entered into Uplink. If the claimant completed the work search but did not submit the form as required, a Reporting Requirement issue may be entered into Uplink. The consequences for the claimant include: 1) placing a "Hold" on the claimant's claim until the REA program compliance requirements have been met; and 2) the subsequent denial of unemployment insurance benefits for failure to comply with REA and UI program requirements. During REA orientation, participants will be informed of their responsibility to participate in reemployment services and the affect of non-participation on eligibility for and receipt of UI benefits.
- Failure to Participate (FTP) service titles are **ONLY USED** once it is determined the claimant **completely failed to participate**. The Failure to Participate determination is made in the event the claimant does not make contact with good cause for missing the REA orientation meeting within a 48-hour window. This time limit applies to any scheduled or rescheduled event.

- During the REA orientation, WorkOne staff will emphasize to claimants the requirement to report to and complete their scheduled reemployment services activities unless they are explicitly excused by the WorkOne staff (e.g., for good cause or for recent or prior completion of certain reemployment services, as set forth in all applicable laws, regulations, guidance and this policy). Good cause for failure to participate in reemployment services may include:
 - The claimant has a start date for a new job;
 - The claimant and the former employer agree that the claimant will return to work at the previous job no sooner than 60 days after the claimant's separation date and the employer provides verification of the same;
 - The claimant has attended a job search workshop within the past three months and the workshop included the core elements of the reemployment service workshop. The claimant must provide proof of his or her participation in the previous workshop and its course content; or
 - The claimant provides a compelling reason for missing the workshop, including, but not limited to, one of the following circumstances:
 - Personal illness;
 - Emergency health arrangements for family members;
 - A natural occurrence (e.g., flooding, snow storm, tornado, etc.) that prevents the claimant from working a work day;
 - Lateness for attendance caused by unforeseen and unusual circumstances (e.g., car trouble, traffic congestion, loss of usual method of transportation, etc.); or
 - Death of an immediate family member.

In such cases, the claimant must be rescheduled for the next available workshop.

The WorkOne staff will exercise reasonable discretion in responding to claimant requests to reschedule participation to a different date or office location (within the region in which the claimant resides) when the request is made in advance of the scheduled activity. If a claimant fails to report to the activity (or an appointment in lieu of the activity) or fails to complete the activity, and the WorkOne staff has not excused the claimant for good cause, such failure will be reported as a Failure to Participate (FTP) in reemployment services. The automated process will then print the resulting list of issues and forward the list to the director of UI Benefits for appropriate adjudication of eligibility. Upon the posting of any FTP service title, staff will follow the directions on documentation required by the Adjudication Center in the "Local Office UI Procedures Manual."

The usual FTP documentation consists of a copy of the IRP (outline agreed upon for claimant training or program activities), attendee sign-in sheets from the scheduled activity which shows time, date and location of activity (event evidence) and brief comments on why an UI issue should be entered into the system to aid the UI adjudicator in the decision making process.

Exemption from participation in REA program is authorized for the following reasons:

- Members of a union hiring hall, in good standing;
- Receipt of similar/same services within the last 90 days;
- Reside out of state;
- Enrollment in state approved training program;

- Have documentation of a start date for a new job within 60 days from date of separation; or
- The claimant and the employer agree that the claimant will return to work at their previous job within 60 days from date of separation.

Waiver of Participation

Claimants may *NOT* choose to waive themselves out of the program because they don't want to participate without negatively affecting their continued eligibility for UI benefits. If the claimant still refuses to participate, the claimant must be informed that it **will most likely disqualify them for weekly UI benefits, and they must sign the waiver portion of the IRP form**. Once the form has been signed and dated, please submit it to Adjudication Center so benefits can be suspended.

Attached are several documents that provide more detailed instructions on the REA process and provide work history for WorkOne staff.

Questions on the TAB may be directed to:

Catherine Lawell
Program Director, REA/WPRS
Indiana Department of Workforce Development
10 N. Senate Avenue
Indianapolis, IN 46220
Telephone: (317) 232.3623
Email: clawell@dwd.in.gov
Web: www.in.gov/dwd

Attachments

- A: Claimant Notice to Appear for REA Program Orientation.
- B: Final Notice to Claimant of Need to Appear for REA Program Orientation.
- C: Self-Assessment/Work History/Contacts.
- D: REA Sign-in Sheet for Documentation of Attendance at REA Program Orientation
- E: Orientation and One-on-One Assessment Interview Guide
- F: Individual Reemployment Plan (IRP)/30 day Review
- G: Bi-Weekly Participation Log to Document Job Search Activities for Two Weeks
- H: REA 2012 - Frequently Asked Questions and Answers
- I: REA/WPRS Services - TrackOne Quick Reference Guide
- J: REA and Track One (T1): Staff Guide
- K: Mail Merge Instructions for Reemployment Services Notification Letters, Word
- L: Mail Merge Instructions for Reemployment Services Notification Letters, Excel

Attachment A: Claimant Notice to Appear for REA Program Orientation

**PLEASE READ CAREFULLY!!
FAILURE TO COMPLY MAY AFFECT TIMELY RECEIPT OF YOUR UNEMPLOYMENT BENEFITS!!!**

Date
Name
Address
City, State ZIP

Dear _____:

Based on your recent filing for Unemployment Insurance benefits, you have been selected to participate in Reemployment Services (RES). This Federally funded program has been designed to improve your ability to successfully obtain employment through enhanced services provided by the State of Indiana and the Indiana Department of Workforce Development. These services are available at your local WorkOne office, and may include job search workshops, individual job search assistance, employment counseling, job training and other services as needed.

To continue to be eligible to receive unemployment insurance (UI) benefits, Indiana law requires:

- Your participation in this REA program;
- Your registration for work at www.indianacareerconnect.com within 4 weeks of filing your initial claim; and
- That you will be able and available for work and actively conducting a job search during each week that UI benefits are being claimed.

Please contact me immediately if one of the following situations apply (*proof will be required*):

- you have a new hire date, or a return to work date within 60 days of initial separation;
- you are in a state-approved training program; or
- you are currently a member in good standing with a union hiring hall.

If none of the situations above apply, you **MUST** attend the **RES Orientation** scheduled below:

- **WHEN:** _____
- **WHERE:** _____
- **TIME:** _____ (NO LATE ADMITTANCE)

VERY IMPORANT – PRIOR TO ATTENDING ORIENTATION, YOU MUST:

- Bring your picture ID and SS card to WorkOne to register for services; and
- Complete a resume visible to employers online at www.indianacareerconnect.com

Failure to attend this orientation as scheduled without contacting me within 48 hours of the date & time listed above, or failing to comply with any portion of the program or any of its components may result in disruption of your UI benefits.

Sincerely,
Staff Name
Title
E-mail address
Phone number and extension

Be Prepared!

Please completely fill out the enclosed Self-Assessment/Work History/Contacts forms and bring with you to your REA orientation.

Attachment B
Final Notice to Claimant of Need to Appear for REA Program Orientation

PLEASE READ CAREFULLY!!
2nd and FINAL NOTICE
FAILURE TO COMPLY MAY AFFECT TIMELY RECEIPT OF YOUR UNEMPLOYMENT BENEFITS!!!

Date
Name
Address
City, State ZIP

Dear _____:

On (date of original letter), you were sent notification that you were scheduled to attend RES Orientation on (original orientation date). You were instructed to contact me within 48 hours if you were unable to attend. This is your 2nd and FINAL notification.

YOU MUST ATTEND TO PREVENT FURTHER DISRUPTION OF YOUR UNEMPLOYMENT BENEFITS!

Based on your recent filing for Unemployment Insurance benefits, you have been selected to participate in Reemployment Services (RES). This Federally funded program has been designed to improve your ability to successfully obtain employment through enhanced services provided by the State of Indiana and the Indiana Department of Workforce Development. These services are available at your local WorkOne office, and may include job search workshops, individual job search assistance, employment counseling, job training and other services as needed.

To continue to be eligible to receive unemployment insurance (UI) benefits, Indiana law requires:

- Your participation in this RES program;
- Your registration for work at www.indianacareerconnect.com within 4 weeks of filing your initial claim; and
- That you will be able and available for work and actively conducting a job search during each week UI benefits are being claimed.

Please contact me immediately if one of the following situations apply (*proof will be required*):

- you have a new hire date, or a return to work date within 60 days of initial separation;
- you are in a state-approved training program; or
- you are currently a member in good standing with a union hiring hall.

If none of the situations above apply, you **MUST** attend the RES Orientation scheduled below:

- **WHEN:** _____
- **WHERE:** _____
- **TIME:** _____ (NO LATE ADMITTANCE)

VERY IMPORANT ...PRIOR TO ATTENDING ORIENTATION, YOU MUST:

- Bring your picture ID and SS card to WorkOne to register for services; and
- Complete a resume visible to employers online at indianacareerconnect.com

Failure to attend this orientation as scheduled without contacting me within 48 hours of the date & time listed above, or failing to comply with any portion of the program or any of its components may result in disruption of your UI benefits.

Be Prepared!

Please *completely fill out* the enclosed Self-Assessment/Work History/Contacts forms and bring with you to your RES orientation.

Sincerely,
Staff Name
Title
E-mail address
Phone number and extension

Attachment C
Self-Assessment/Work History/Contacts

2012 RE-EMPLOYMENT SELF-ASSESSMENT

Your Name: _____ Last four of SS#: _____

Your last employer: _____ Dates employed: _____

Why did you leave your last job?: _____

What type of job would you like?: _____ NOT like, if any? _____

Rate of pay at last job: \$ _____ Minimum you would accept: \$ _____

Are you in school/training now? YES NO
 Are you a member of a hiring hall? YES NO
 How would you rate your computer skills?: NONE • BASIC • INTERMEDIATE • ADVANCED?
 What days and hours are you available to work? _____
 Education: NO GED • GED • Diploma • College (Degree: _____) • Other: _____

Please answer the following questions honestly. This will ensure Work One staff has all the information necessary to provide assistance in removing any barriers that may be hindering your re-employment success. All information is confidential and will only be used to provide personalized guidance for work search purposes. Incorrect information will negatively affect our ability to help you find work.

Do you have?			
An active account on Indianacareerconnect.com ?	YES		NO
A manually entered resume on Indianacareerconnect.com ?	YES		NO
A valid drivers' license?	YES		NO
If yes, license classification/or endorsements (_____)			
A telephone number in service? (_____)	YES		NO
An active email account? (_____)	YES		NO
Reliable childcare, if applicable?	YES	N/A	NO
A return to work date, or start date for a new job?	YES		NO
Any health/medical/disability issues that might affect work type?	YES		NO
Any family or domestic problems/responsibilities?	YES		NO
Any legal issues that could affect job opportunities?	YES		NO
Any current issues with housing, food, utilities, etc.	YES		NO
Self-employment income? (mowing yards, babysitting, etc.)	YES		NO
Appropriate interview clothing?	YES		NO
A willingness to work?	YES		NO
Any job leads or a specific plan to obtain a job?	YES		NO

Comments: _____

Signature _____ Date _____

PLEASE PRINT LEGIBLY

COMPLETE OTHER SIDE



Attachment C
Self-Assessment/Work History/Contacts

WORK HISTORY

(Please list last three employers below)

Employer #1: _____
Address: _____
City, State, Zip: _____
Phone Number: _____ Job Title: _____
Rate of Pay: _____ Start date: _____ End Date: _____
Reason for Leaving: Lay-off Discharge Voluntary Quit Retired Other: _____

Employer #2: _____
Address: _____
City, State, Zip: _____
Phone Number: _____ Job Title: _____
Rate of Pay: _____ Start date: _____ End Date: _____
Reason for Leaving: Lay-off Discharge Voluntary Quit Retired Other: _____

Employer #3: _____
Address: _____
City, State, Zip: _____
Phone Number: _____ Job Title: _____
Rate of Pay: _____ Start date: _____ End Date: _____
Reason for Leaving: Lay-off Discharge Voluntary Quit Retired Other: _____

Provide the name and phone number of two people (that do not live with you) whom WorkOne staff may contact if we cannot reach you regarding your participation in this program. If WorkOne staff are unable to contact you, this may lead to an Able and Available issue that could adversely affect your Unemployment benefits.

Also, you must notify WorkOne of any changes to your contact information within 48 hours by updating the "Personal Information" section on your Uplink claimant home page.

Name: _____	Name: _____
Phone Number: (____) _____	Phone Number: (____) _____
Relationship: _____	Relationship: _____

PLEASE PRINT LEGIBLY
SIDE

COMPLETE OTHER



Attachment D
REA Sign in Sheet for Documentation of Attendance at REA Program Orientation

REA Orientation Attendance Sheet

Please print clearly so that you receive proper credit for attendance.

REA ORIENTATION	SIGN-IN	SHEET	DATE:	TIME:
NAME	LAST 4 OF SSN	EMAIL ADDRESS	PHONE #	

Attachment E
Orientation and One-on-One Assessment Interview Guide

2012 RE-EMPLOYMENT SERVICES (RES)
Orientation and Assessment Interview Guide

1. RES Orientation (includes both REA and WPRS Programs)

- a. Sign-in Sheet:
 - i. This sign-in sheet may be scanned/faxed as documentation for Failure to Participate, so please follow directions carefully! Missing information or inaccuracies may result in reversal of decisions at an appeal hearing.
 - ii. Using black or blue ink ONLY, all claimants should sign-in on the RES sign-in sheet, and include their signature, printed name, phone number, email (if applicable) and last four of their social security number (see attached example). Dates MUST be correct on all pages.(RED INK will not scan clearly);
 - iii. If your orientation sign-in sheet requires more than one (1) page, make sure that each page includes the title (RES Orientation), date and time; and
 - iv. Remind attendees to print clearly so that they get credit for attending.
- b. Information to be included in RES Orientation:
 - i. Requirements of RES Program:
 - 1. Complete individual or group RES Orientation;
 - 2. Self-Assessment/Work History form;
 - 3. Suitable resume on www.indianacareerconnect.com (ICC) visible to employers. (Suitable resume is defined as one reflecting applicant's skills, experience, and training);
 - 4. Assessment Interview (One-on-One appointment with RES Coordinator);
 - 5. Bi-Weekly RES Participant Log;
 - 6. Individual Re-Employment Plan (IRP); and
 - 7. An explanation of mandatory participation and potential consequences of failing to participate in RES services (explain both the possible UI hold and the 48-hour contact requirement).
 - ii. Review of all available WorkOne services (PowerPoint presentation).
- c. At the end of orientation, the RES Coordinator will collect the Self-Assessment/Work History forms, reviewing for missing information and schedule a return date and time for each claimant's Scheduled Assessment Interview.
- d. Once the claimant is enrolled in TrackOne (Edit Participant screen is updated and program eligibility screen is completed). Enter the intensive services listed below and include a proper case note:
 - 1. Completed-Orientation;
 - 2. Orientation Workshop (for WorkOne Orientation); and
 - 3. Scheduled Assessment Interview

2. RES Assessment Interview (One-on-One Interview with RES Coordinator)

- a. In-depth review Self-Assessment/Work History form, review of W.I.N. or Prove-It results, if applicable;
- b. Place copy of ICC resume in file, verify it is visible on-line to employers, and is suitable for claimant's skill and education levels;
- c. Thoroughly explain Bi-Weekly RES Participant Log including: how to document activities; procedure for submission of completed logs; and the possible consequences of non-participation. While these must be submitted to the attention of the REA Coordinator, REA supportive staff may assist with the collection and processing of Bi-Weekly forms.
- d. Schedule WorkOne workshop(s), if applicable;
- e. Assign additional assessments, if applicable;
- f. Referral to Case Manager/Career Advisor, as applicable, for:

Attachment E

Orientation and One-on-One Assessment Interview Guide

- i. Review of IRP for use in rafting ACP, if applicable.
 - ii. Assignment and review of I.C.E. assessment, if applicable;
 - iii. Claimant centered Labor Market Information (LMI);
 - iv. Self-directed/staff assisted job search;
 - v. Resume assistance (as needed);
 - vi. Completion of ACP (if not already completed).
- g. Completion of IRP
- i. IRP will state the next steps, including 2(a) through 2(f) above;
 - ii. Signed by both claimant and RES Coordinator;
 - iii. Original scanned into TrackOne and/or placed in file; and
 - iv. Copy given to claimant.

3. WPRS Program Differences

- a. WPRS selectees will go through the same orientation process as the REA selectees.
- b. WPRS selectees *will not* be informed of the option to not accept services until the end of their One-on-One Assessment Interview.
 - i. Once they have completed RES Orientation and their Assessment Interview, DWD Field Operations believes the claimant will recognize the value of WorkOne and Reemployment Services, and will willingly agree to full participation.
 - ii. Once WPRS selectees agree to participate in RES services, they will be held to the same mandatory components as REA selectees including development of an IRP and referral to case management services, if needed.
 - iii. ***Remember, the WPRS selectees are the claimants most at risk of exhausting their unemployment insurance (UI) maximum benefit amount (MBA) before finding employment.***
- c. If they choose to not participate, gently explain that not accepting RES services at this time may limit our ability to assist with requests for funding for training, etc. in the future.
 - i. If they still are not interested in participating further, have them complete the appropriate waiver section at the bottom of the IRP, and both the claimant and coordinator will date and sign. Scan or pdf the IRP into the Client file section in TrackOne to document for future use.

4. Important Notes

Failure to Participate (FTP) Status:

- Claimants who do not call or show up for a scheduled appointment within 48 hours of the missed appointment will be considered to be in FTP status.
- If the claimant reschedules *before* their scheduled appointment *or* contacts staff within the 48-hour timeframe, and demonstrates good cause (including documentation, if necessary), a FTP issue *will NOT* be entered and the claimant will be rescheduled.
- FTP on the original scheduled appointment may be lifted upon rescheduling of the event. If a rescheduled appointment is missed, an indefinite hold will be placed until the claimant has completed the agreed upon activity.



CAUTION: Only when a claimant has *NOT* contacted staff within the 48-hour timeframe and is in FTP status should a “rescheduled” service be entered!

Entering a “rescheduled” service outside of these circumstances *or duplicate services of any kind* will cause an error on quarterly reports. The Department of Workforce Development Field Operations is committed to providing accurate and timely reporting to the

Attachment E

Orientation and One-on-One Assessment Interview Guide

Department of Labor. Therefore Coordinators *will also be held accountable* for *accuracy and timely reporting* regarding Reemployment Services entered. Multiple occurrences of duplicate or missing entry of services **will be documented and coaching will be provided**. *Continued occurrences may affect the Work Performance evaluation.*

Suggestions

When combining groups for orientation, you may consider utilizing the following helpful suggestions:

- Whenever possible, it is suggested that the REA and WPRS Coordinators combine efforts to facilitate REA/WPRS orientations.
- At the end of the orientation, the coordinators separate attendees by program to schedule the Assessment Interview appointments. This will ensure cross-training from REA to WPRS, which will be helpful during the absence of either coordinator.
- Since both REA and WPRS initial and final notice orientation letters are identical, except for specific coordinator contact information, it may be helpful to color-code the letters *and* Self-Assessment/Work History enclosure by program, to identify REA from WRPS at a glance.

Attachment F:
Individual Reemployment Plan (IRP)/30 day Review

Individual Re-employment Plan (REA/ WPRS)

Name:

Social Security Number:

Original Date of IRP:

Understanding and Agreement

I have been informed of the Reemployment Services Program Requirements and agree to the following:

1. To complete Assessment
 - REA Self- Assessment/ return completed assessment at orientation
2. To complete REA Group Orientation
3. To complete One-On-One w/ REA Coordinator:
 - IRP completed, signed and dated by customer and RES Coordinator
 - Claimant-centered LMI
 - Referral to Self –Directed Job Search, which includes submission of Reemployment Services (REA) Participant Log on a Bi-Weekly basis to their REA Coordinator. Participant Log must include 2 weeks' worth of Job Searches, 3 contacts including minimum of 1 application submitted per week, plus 2 job search-focused activities per week: Job Search Workshops, Career Research, or Job Readiness Activities. On-going.
4. 8 Work Search activities or Workshops minimum to be completed within 1 month of orientation date. (Additional workshops may be assigned as determined by individual need, by Case Management Staff.)

Workshop Title	Location	Date	Time

5. To submit completed Participant Bi-Weekly Participation Log to REA Coordinator
 - Document job search details of 3 contacts including minimum of 1 application submitted per week.
 - 2 Job Search-focused activities per week: Job Search Workshops, Career Research, or Job Readiness Activities
6. To register for Work Search including an Indiana Career Connect Resume visible on-line to employers:
 - www.Indianacareerconnect.com

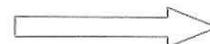
Must be completed within 1 month of orientation date
7. IF referred to Case Management, to complete the three Indiana Career Explorer Assessments before my first appointment with my assigned Case Manager, the assessments must be completed within 1 month of the REA orientation date
 - www.indianacareerexplorer.org

Or attend a Career Exploration Workshop offered through WorkOne
8. To attend all scheduled appointments and activities scheduled by the REA Coordinator and Case Manager
 - To partner with Case Management to build an Academic Career Plan (ACP), if needed and come prepared to participate in its completion Case Manager: _____
9. **I agree to contact the REA / WPRS Coordinator or WorkOne Case Manager if I need assistance with any of the above steps, and/ or within 48 hours of any scheduled event if I am unable to keep my scheduled appointment. Documentation of absence may be required**

Initials that I have read this page: _____

PLEASE PRINT LEGIBLY

COMPLETE OTHER SIDE



Attachment F:
Individual Reemployment Plan (IRP)/30 day Review

Signatures and Assurances

This plan outlines services that are designed to assist you in making a successful transition to new employment. By signing this document, you agree to fully participate in the specified activities, and any additional agreed upon activities with your Case Manager.

I understand that failure to comply with the terms of this plan or my ACP (developed with my Case Manager) may affect my eligibility to continue to receive Unemployment Insurance Benefits:

Signature: _____

Date: _____

REA / WPRS Advisor Signature: _____

Date: _____

30 Day Follow-Up

- REA Self -Assessment Completed
- REA Group Orientation Completed
- REA One-on-One between REA Coordinator and REA / WPRS Participant
- Workshops

Workshop	Outcome

- REA Logs
- Resume posted on Indiana Career Connect
- Three assessments completed on Indiana Career Explorer, if assigned by Case Manager.
- Attend scheduled appointments with REA Advisor
- Create an Academic Career Plan (ACP) with a Career Advisor **and** attend all scheduled appointments with Career Advisor, as needed.

REA / WPRS Waiver

- REA ONLY:** I have already received re-employment services adequate to meet my needs.
- WPRS ONLY:** I have been informed of available re-employment services and do not wish to participate in recommended services.
- REA /WPRS:** I understand that waiving these services now may affect my ability to receive further services from WorkOne in the future, and most likely will adversely affect my eligibility to continue to receive Unemployment Benefits.

Signature: _____

Date: _____

PLEASE PRINT LEGIBLY

COMPLETE OTHER SIDE



Attachment G
Bi-weekly Participation Log to Document Job Search Activities for Two Weeks

Reemployment Services Bi-Weekly Work Search and Activity Log for Weeks Ending: _____

Name _____ **Last 4 of SSN:** _____

3 Per Wk	Date Submitted	Company Name	Mailing Address or Website	App. or Resume	In Person or Online	Job Title or Position Applied for	Results
1							
2							
3							
1							
2							
3							

Other Job Search Activities including, but not limited to: Work One Workshops, Skills Assessments, Networking Event, Career Research, Job Shadowing, Reverse Interview, Self-Help (adapting to change, motivational, Career Exploration, or Job Search related, etc.), books/videos/or websites I have utilized in the last 2 weeks:

2 Per Wk	Job Search Activity Type	Date Completed	Topic or Activity?	What did you accomplish or learn?	How has it benefitted your job search?
1					
2					
1					
2					

***Bi-Weekly Work Search/Activity logs must be submitted in a timely manner. This includes completion of 2 other job search activities each week. Failure to comply may result in a Failure to Participate issue and Denial of Benefits for the missing weeks.

PLEASE PRINT LEGIBLY

READ OTHER SIDE



Attachment G
Bi-weekly Participation Log to Document Job Search Activities for Two Weeks

Instructions for Completion of the Reemployment Services Participation Log

A. Weeks ending: What 2 weeks does this document report on? (Week-ending date will always be Saturday.)

B. Job Search Activity

1. **Date Submitted:** When was application submitted? (Do NOT count picking up applications, only submissions).
2. **Company Name:** Spell out the name of the company you contacted to apply for a job.
3. **Address or Website Link:** Give the physical address or the website address of the company you contacted and applied for a job. For example: 1234 Merchant Square, Yourtown, IN 46222, or "IndianaCareerConnect.com".
4. **Application or resume?** Which did you submit?
5. **In-person or on-line?** How did you apply for a position: on-line, email, or in-person?
6. **Job Title or Position Applied for?** What is the position you applied for? If you applied on IndianaCareerConnect.com, please indicate the Job order number.
7. **Results:** "Pending"; "Not hiring"; "Interviewed"; "No response"; "Position offered"; "Submitted application"; "Did not accept job offer because...".

A. Resources Utilized:

1. **Job Search Activity Type:** Job Club; Websites; WorkOne Workshops; Library; Volunteerism; Reverse Job Interview.
2. **Date Completed:** What date was this activity begun/ completed?
3. **Topic or Activity:** List the Websites used to research company background, occupational, or job seeking skills related: Books read with job search information. Location of Volunteerism. (Include a contact name for volunteerism).
4. **How has it benefitted my job search?** Consider the type of work you are seeking... why did you seek out this resource? Did you learn anything from this activity which will benefit your job search? What was the item or items you learned during this activity? How will it change your job search approach?

PLEASE PRINT LEGIBLY

COMPLETE OTHER SIDE



Attachment H
REA 2012 Frequently Asked Questions and Answers

Reemployment Services FAQs

Reemployment & Eligibility Assessment (REA), Control, and Worker Profiling Reemployment Services (WPRS)

1. What are REA, Control Group, and WPRS?

REA is a study that:

- Is funded thru a one year renewable grant from the USDOL.
- Designed to assist Unemployment Insurance (UI) claimants through an early intervention to aid individuals in a quicker return to meaningful employment, eliminate UI fraud and provide a savings to the unemployment fund.
- Statistical model is used to profile claimants based on their responses when they file their initial UI claim. REA claimants are identified as unlikely to return to their previous jobs or occupations, and likely to exhaust their regular unemployment benefits based on the following variables: education, job tenure, maximum benefit amount of claim, occupation and unemployment rate of region.
- REA selectees are required to participate in all mandatory components to continue UI eligibility including: orientation, assessment, Individual Reemployment Plans, claimant-centered Labor Market Information, referral to self-directed job search, and additional services (job search workshops, job search assistance, employment counseling, and referral to other services, as needed.)

CONTROL group is part of the REA project and is used for comparison purposes:

- Is the “placebo” of the REA study, and never contacted or informed they are part of the study.

WPRS is a USDOL program:

- Is funded with Wagner-Peyser funding. The WPRS program year is July 1 through June 31st. They are offered the same information on available services, but may choose not to accept services. Once they agree to accept services, they are held to same mandatory requirements as REA group.

2. What should the procedure be regarding an REA or WPRS selectee who lives outside your region, but is selected by your office for assistance?

For REA:

- Find out if the clamant selected the specific WorkOne office intentionally or in error. If it was intentional because of personal preference or location, then accommodate the claimant’s request by serving them in the requested office. If the selection was made in error, email the local office coordinator in the appropriate office so they can schedule the claimant for orientation ASAP.
- If a WorkOne office receives notice of someone who needs transferred in, they must add them to the next available orientation mailing list.
- If the claimant has already attended orientation or has received intensive services, contact the new Coordinator and involve the Master User in each region by requesting a transfer of files.
- WPRS claimants must receive services in the county where they reside, as per DOL.
- If there are extreme personal reasons why a claimant prefers not to receive services at their nearest One-Stop, please document in case notes and scan a claimant statement into their client file documenting circumstances such as personal relationship with someone in the designated office, etc. which warrants an exception.
- Please contact Catherine Lawell if an exception has been requested, and include specific reasons for the request.

3. Is it OK if our office makes changes to the letters and forms you have sent us?

- No. The letters and forms are in the process of approval by the State. Once the final version has been approved, the only permitted change or addition will be the name and contact information of the Coordinator, and the location, time, and date information.
- Any regions requesting a variance from DWD-approved RES forms may contact Catherine Lawell to discuss other options.

Attachment H
REA 2012 Frequently Asked Questions and Answers

- RES Coordinators may also choose to print on color-coded paper to help claimants identify which program they have been selected for, and to identify a second/final notification letter.

4. Can someone enrolled in REA receive a waiver for work search?

- Once a claimant been selected and enrolled in the REA program, they are **not** to be exempted from turning in their REA Participant logs.
- Enrollment in an intensive state-approved training program which will result in a degree, such as the RN program (where the training includes clinical and school work) *might* qualify the individual for a waiver from work search, but they **MUST** continue to receive official case management services to ensure the individual is being held accountable for showing sufficient progress in school. Do **NOT** waive them from the REA program. This is how we can continue to hold them accountable for failure to participate issues.
- If a claimant is in short-term training such as CNA or CDL (truck driving) school, they are still required to participate in work search activities.

5. Do you have a list of accepted job search activities?

a. Other appropriate Job Search Activities may include, but are not limited to:

- WorkOne Workshops
- On-line skills assessments, or WorkKeys
- Networking Event
- Career Research
- Job Shadowing
- Reverse Interview
- Self-Help (adapting to change, motivational, Career Exploration, or Job Search related, etc.), books/videos/or websites
- Shopping for interview outfit

6. How long is an individual required to participate in REA program activities?

- Once an individual has been selected to participate in REA, they remain with the program until finding suitable full-time employment, or their UI benefits (including all extensions) end. This includes submission of Bi-Weekly Participation logs.
- If an individual has completed all WorkOne workshops available and is still struggling with unemployment, a review of job search-related activities by case management might be useful to help the claimant redirect their work search efforts.

7. What type of documentation is required for missed scheduled events?

The RES programs are Unemployment claim-based, and require the same types of documentation utilized for Unemployment weekly claims:

- A doctor's note for illness notating which dates the claimant was unavailable.
- For a job interview, a business card or information notating the time, date, name of interviewer, and location of the interview.
- In case of death of immediate family member, the obituary page (including date) listing the claimant's name as surviving family member, or a copy of death certificate, will document the validity of the absence.
- Although an individual may have a valid excuse for missing a scheduled event, they may still be ineligible for UI benefits due to an Able and Available (AA) issue.
- Remember to fax all documentation into Imaging.

8. What are the trigger services for counts in REA and WPRS?

- REA-“Scheduled for Assessment Interview”
- WPRS-“Completed Orientation”

Attachment H
REA 2012 Frequently Asked Questions and Answers

9. I need clarifications on how we're counting goals in the grant. Do we have until December 31, 2012 or March 31st, 2013 to reach our goal for 2012?

- We have until December 31st, 2012, to reach our 2012 REA goal.
- However, if we have 2012 grant funds remaining, we will continue the 2012 REA program until funding is exhausted, like we did for 2011. All RES numbers during this extension would count for 2012.

10. What is the official timeline for (paper record) storage for REA and WPRS claimants?

- Because REA, WPRS, and EUCREA are UI-based federal programs, we have submitted a request to be officially added to the "UI Records and Disposition Schedule."
- Our official policy will be: Retain all non-scanned paper files for four (4) years AFTER the date of the claim. It is mandatory to notify Emily Wright (using State Form 16) upon destruction of all State records. State form 16 is a hard copy form available for order from the stockroom.

Attachment I
 REA/WPRS Services- TrackOne Quick Reference Guide

Reemployment Services TrackOne Quick Reference

Classifications	
Selected for REA	UI claimant has been selected for participation in REA.
Selected for WPRS	UI claimant has been selected for participation in WPRS.
Selected for Control	UI claimant has been selected for Control. Control selectees are NEVER contacted regarding participation in RES.
Exempt- REA	UI claimant that may or may not have yet attended orientation and has been determined to qualify for exemption from REA program participation.
Exempt-WPRS	UI claimant that may or may not have yet attended orientation and has been determined to qualify for exemption from WPRS program participation.
Waiver-REA	UI claimant that may or may not have yet not attended orientation but has met one or more of the qualifying factors for a waiver from participation in RES services.
Waiver-WPRS	UI claimant that may or may not have yet attended orientation but has met one or more of the qualifying factors for a waiver from participation in RES services.
REA/WPRS Orientation	
REA/WPRS- Scheduled for Orientation	UI claimant is scheduled for orientation. Scheduling does not begin a period of participation.
REA/WPRS- Rescheduled for Orientation	UI claimant is rescheduled for orientation. Rescheduling does not begin a period of participation.
REA/WPRS- Failure to Participate-Orientation	UI claimant fails to attend or participate in scheduled or rescheduled Orientation. Failed to participate does not begin a period of participation.
REA/WPRS-Scheduled	
REA/WPRS -Scheduled -Skills Assessment	Claimant was instructed to return the following forms (completed) to RES Orientation: Self-Assessment and Contact List/Work History. Forms and instructions were included in the RES Notification letter packet.
REA/WPRS -Scheduled-WorkKeys	Claimant has been scheduled for WorkKeys assessment to be utilized in determining their individual strengths and weaknesses and also to help compare their skills to job profiles.
REA/WPRS -Scheduled- Job Search Workshop	Workshop involving organized group activity that provides instructions on job search related skills and information to help claimants carry out a successful job search strategy.

Attachment I
 REA/WPRS Services- TrackOne Quick Reference Guide

REA/WPRS -Scheduled- Job Finding Club	Job Club Services workshop involving organized group activity that provides instructions on job search-related skills and information to help claimants carry out a successful job search strategy by utilizing a structured application of the skills obtained by the claimants in an active job search.
REA/WPRS -Scheduled Job Development	A job development occurs when staff contacts an employer and secures a referral to that employer on behalf of a specific job seeker who possesses skills sought by the employer, and for whom there is no suitable job posted from that employer.
REA/WPRS -Scheduled- Individual Counseling	Interactions between appropriate staff and claimants designed to establish and reach realistic employment goals. Assistance may include support in choosing or changing occupations, making a suitable job adjustment; and addressing personal issues that may limit a claimant's ability to achieve employment related goals. Counseling may result in a recorded Individual Reemployment Plan (IRP).
REA/WPRS -Scheduled- Group Counseling	Group interactions between appropriate staff and claimants designed to establish and reach realistic employment goals. Assistance may include support in choosing or changing occupations, making a suitable job adjustment; and addressing personal issues that may limit a claimant's ability to achieve employment related goals. Counseling may result in a recorded Individual Reemployment Plan.
REA/WPRS -Scheduled- Assessment Interview	RES Coordinator provides initial employment and training guidance to a client based on an initial assessment of a client's skills, education, or career objectives. Enter this service if claimant completed the Assessment Interview (One-on-One).
REA/WPRS-Rescheduled	
REA/WPRS - Rescheduled –Skills Assessment	Claimant is rescheduled for completion of REA/WPRS Skills Assessment. Case notes must document specific details.
REA/WPRS - Rescheduled-WorkKeys	Claimant is rescheduled for REA/WPRS WorkKeys testing.
REA/WPRS - Rescheduled-Job Search Workshop	Claimant is rescheduled for completion of REA/WPRS Job Search Workshop.
REA/WPRS - Rescheduled-Job Finding Club	Claimant is rescheduled for completion of REA/WPRS Job Finding Club.
REA/WPRS – Rescheduled Job Development	Claimant is rescheduled for completion of REA/WPRS Job Development.
REA/WPRS - Rescheduled- Individual Counseling	Claimant is rescheduled for completion of REA/WPRS Individual Counseling.

Attachment I
 REA/WPRS Services- TrackOne Quick Reference Guide

REA/WPRS - Rescheduled- Group Counseling	Claimant is rescheduled for completion of REA/WPRS Group Counseling.
REA/WPRS - Rescheduled-Assessment Interview	Claimant is rescheduled for completion of REA/WPRS Assessment Interview (One-on-One).
REA/WPRS -Fail to Participate	
REA/WPRS – Skill Assessment-FTP	Claimant fails to attend or participate in scheduled or rescheduled Skill Assessment.
REA/WPRS – Work Search Reporting-FTP	Claimant fails to attend or participate in scheduled or rescheduled Work Search Reporting-Bi-weekly Participation Log.
REA/WPRS –REA Services Signed Waiver-FTP	<p>Claimant fails to attend or participate in mandatory REA/WPRS activities.</p> <p>Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits. Both RES Coordinator and claimant have signed and dated waiver form at the bottom of the IRP stating they understand and agree to these terms.</p> <p>REA/WPRS waivers must be reported to UI Adjudication Field Problem Resolution team as a FTP issue, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.</p>
REA/WPRS – Job Search Workshop-FTP	<p>Claimant fails to attend or participate in scheduled or rescheduled Job Search Workshop.</p> <p>Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits. Failure to participate in any agreed upon activity will be reported to UI Adjudication Field Problem Resolution team as an issue, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.</p>
REA/WPRS –Job Finding Club-FTP	<p>Claimant fails to attend or participate in scheduled or rescheduled Job Finding Club. Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits.</p> <p>Failure to participate in any agreed upon activity will be reported to UI Adjudication Field Problem Resolution team as an issue, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.</p>
REA/WPRS- Job Development-FTP	<p>Claimant fails to attend or participate in scheduled or rescheduled Job Development. Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits. Failure to participate in any agreed upon activity will be reported to UI Adjudication Field Problem Resolution team, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.</p>
REA/WPRS- Individual Counseling-FTP	<p>Claimant fails to attend or participate in scheduled or rescheduled Individual Counseling.</p> <p>Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits. Failure to participate in any agreed upon activity will be reported to UI Adjudication Field Problem Resolution team, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.</p>

Attachment I
 REA/WPRS Services- TrackOne Quick Reference Guide

REA/WPRS – Assessment Interview (One-on-One) -FTP	Claimant fails to attend or participate in scheduled or rescheduled Assessment Interview. Claimant has been notified that refusal to participate in these scheduled activities may affect their continued eligibility for weekly UI benefits. Failure to participate in any agreed upon activity will be reported to UI Adjudication Field Problem Resolution team, and appropriate supportive documentation be scanned into Imaging for record-keeping and determination of issues.
REA/WPRS Services-Completed	
REA/WPRS -Skills Assessment-Completed	Claimant has completed and returned Self-Assessment/Contact List/Work History.
REA/WPRS - WorkKeys-Completed	Claimant has completed WorkKeys assessment as agreed upon.
REA/WPRS – Job Search Workshop- Completed	Claimant has completed a Job Search Workshop as agreed upon.
REA/WPRS – Job Finding Club- Completed	Claimant has completed a Job Finding Club as agreed upon.
REA/WPRS - Job Development-Completed	Claimant has completed a Job Development activity as agreed upon.
REA/WPRS - Individual Counseling-Completed	Claimant has completed Individual Counseling as agreed upon.
REA/WPRS – Group Counseling- Completed	Claimant has completed Group Counseling as agreed upon.
REA/WPRS - Assessment Interview- Completed	RES Coordinator provides initial employment and training guidance to a client based on an initial assessment of a client’s skills, education, or career objectives. Enter this service if claimant completed the Assessment Interview (One-on-One).
REA/WPRS- Orientation- Completed	RES Orientation provides the Claimant with REA program information, the mandatory requirements for participation, and an overview of the services available at WorkOne. Orientation may be provided individually, or in group sessions. It will provide information on the services required for RES as well as other community services, and will require completing forms and scheduling of additional services, as needed. Enter the Completed Orientation if the claimant attended the RES Orientation session.

Attachment I
 REA/WPRS Services- TrackOne Quick Reference Guide

Completed Service Strategy (Individual Reemployment Plan-IRP)	Enter this service if claimant completed and signed the Individual Reemployment Plan (IRP) during the Assessment Interview.
REA/WPRS Follow-up	
REA/WPRS Follow-up Bi-weekly Participation Log Submission	Enter this service to document the Bi-Weekly Participation Log has been submitted timely, as scheduled according to local office procedure. Notate the bi-weekly week ending dates.



Caution

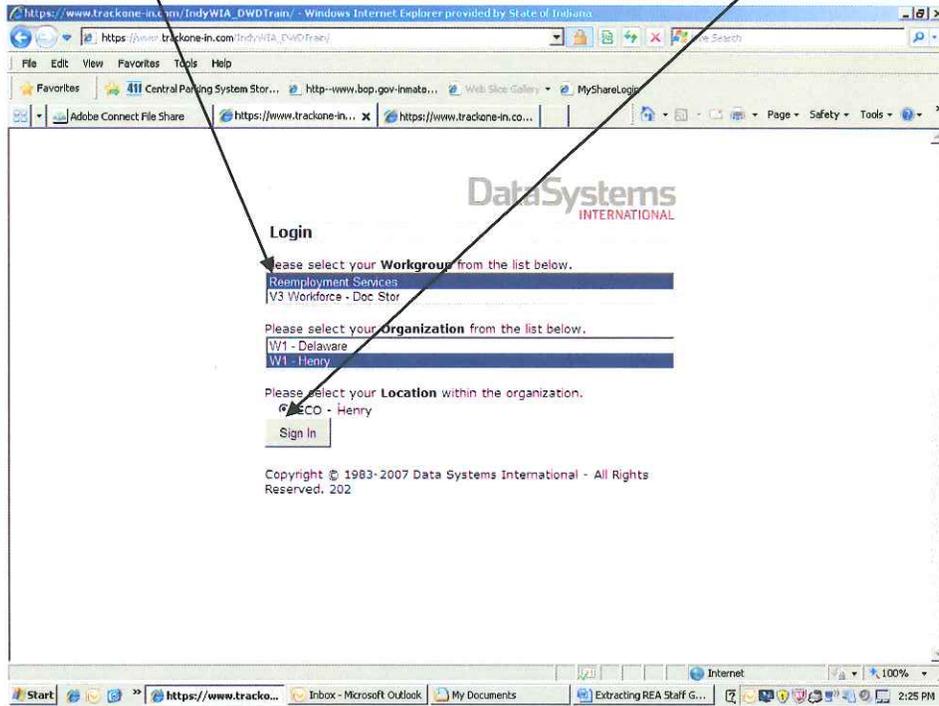
- The workshop services are informational core services *up until the point individual clients are assisted by staff based on the specific needs of a client (rather than general information needs).*
- Once services specifically applicable to a client are provided, an additional service must be recorded. *If the service is a WIA service, it will be in the staff-assisted core or intensive tier.*
- If the workshop provides the client with development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct, to prepare individuals for unsubsidized employment or training, *the service should be recorded as Pre-Vocational Activities (intensive tier).*

REA/WPRS and TrackOne (T1) Staff Guide

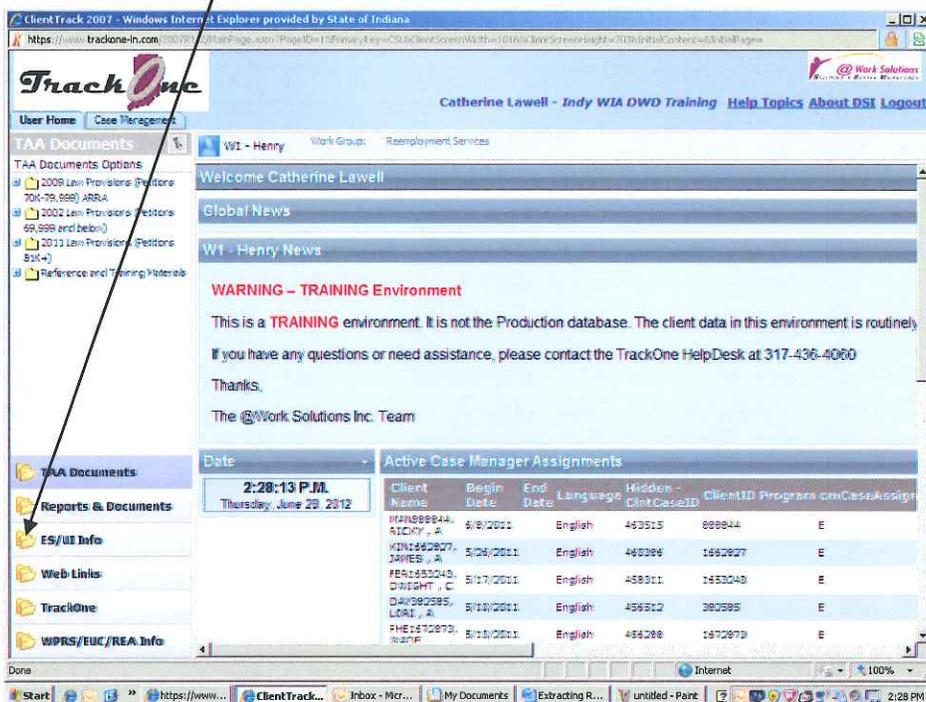
Extracting REA/WPRS Weekly Profiling List from T1

NOTES

1. Sign in to T1 by entering your user name and password. Click on Reemployment Services so that it is highlighted and then click "Sign In".



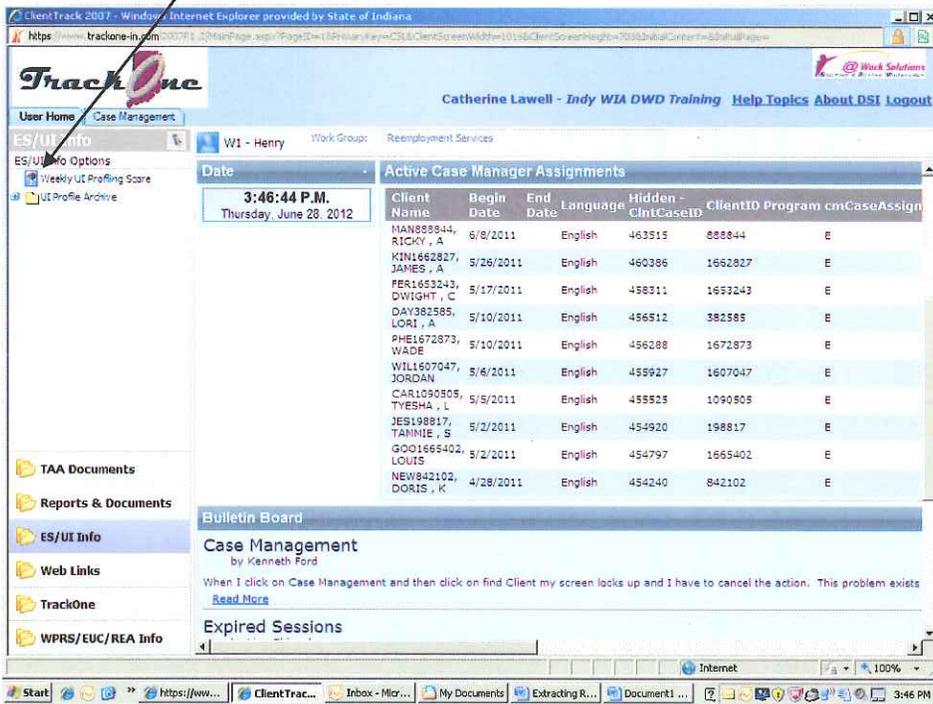
2. Click on the "ES/UI Info" tab.



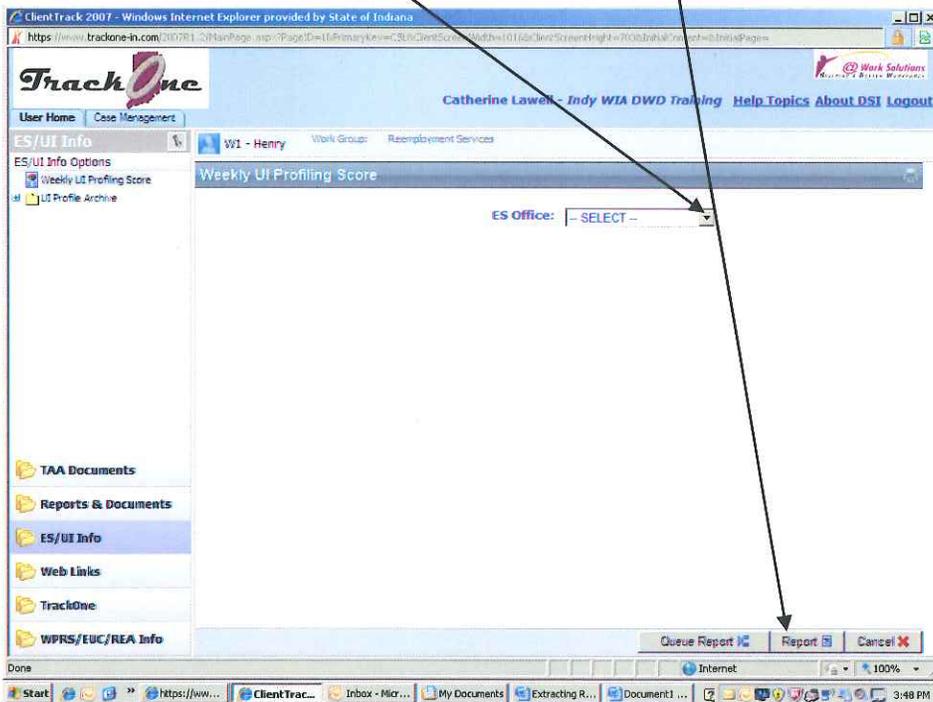
Attachment J

3. Click on "Weekly UI Profiling Score."

NOTES



4. Select your ES Office from drop down box, then click "Report".



Attachment J

5. The Weekly Profiling list will appear. (SSNs below have been removed for security purposes.) Click on the Adobe Reader button.

NOTES

Report Viewer

Page: 1 of 1

Weekly UI Profiling Score

Run Date: 6/29/2012
Location: 3400

ES OFFICE	CLASSIFICATION	SSN	GENDER	DOB	SCORE
Bedford	Traditional		F	08/20/1987	0075330
Bedford	Traditional		M	10/04/1956	0071631
Bedford	REA		M	03/07/1984	0070193
Bedford	REA		F	05/09/1991	0069270
Bedford	REA		F	01/16/1977	0067557
Bedford	REA		F	09/09/1949	0066837
Bedford	Control		F	01/04/1954	0064649
Bedford	REA		F	07/21/1958	0063525
Bedford	REA		M	08/18/1972	0059177
Bedford	REA		F	06/06/1989	0059132
Bedford	REA		F	10/20/1938	0058367
Bedford	Control		F	08/28/1983	0057866
Bedford	REA		M	01/27/1979	0057169
Bedford	REA		M	09/02/1962	0055902
Bedford	REA		F	03/24/1984	0055402

6. Wait for the pdf to report for Export, or "Click here" to allow the download if needed.

Report PDF Export

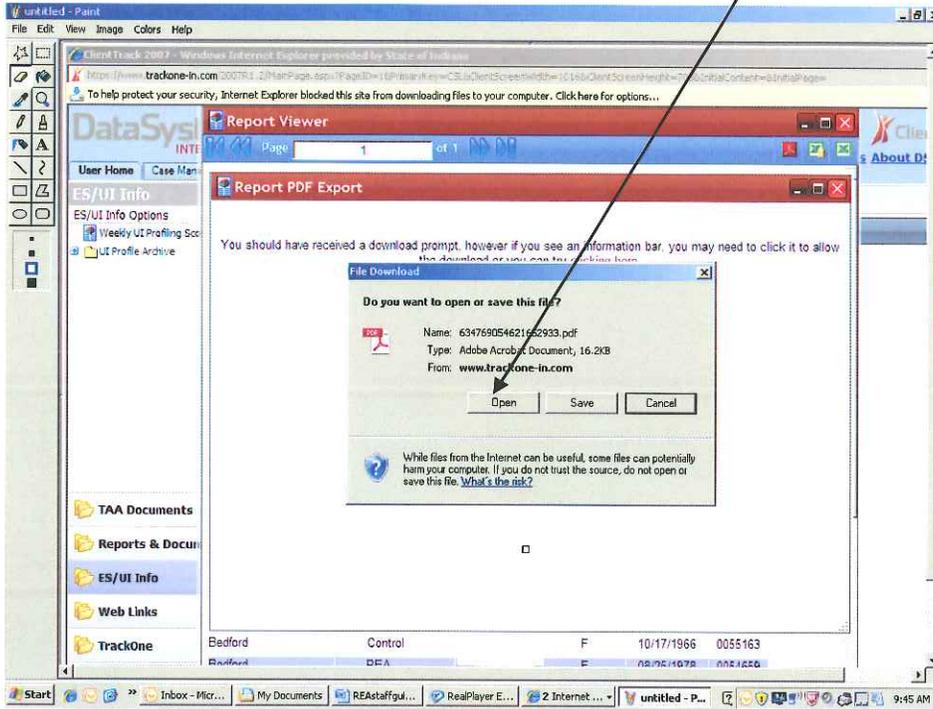
You should have received a download prompt, however if you see an information bar, you may need to click it to allow the download or you can try [clicking here](#).

This window will automatically close in 12 seconds.
[Close Window](#)

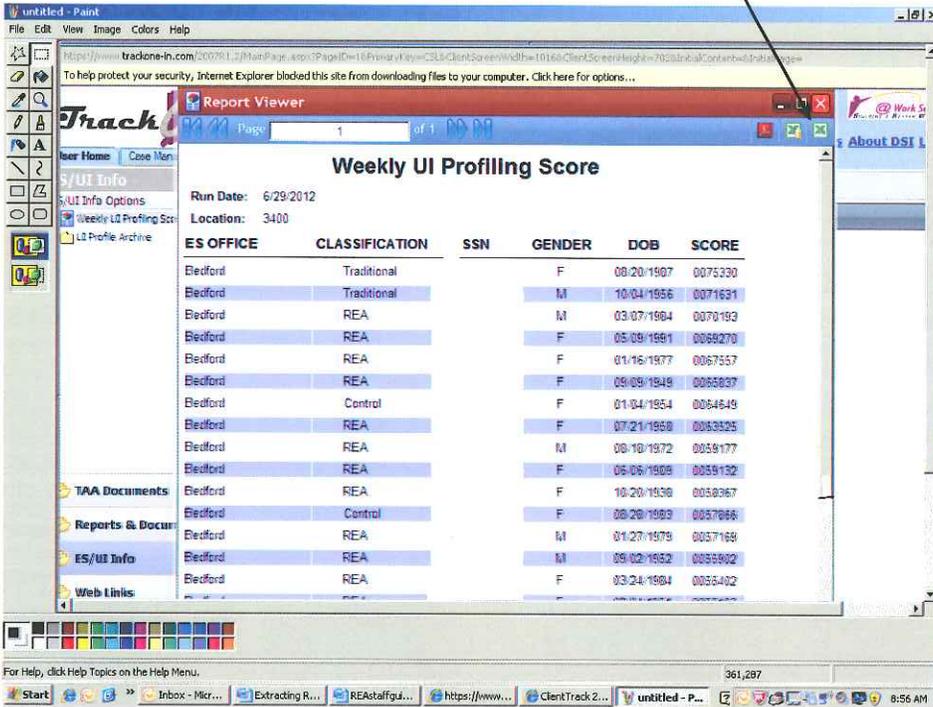
Attachment J

7. IF you had to "Click here" as shown above, then you will Click "Open". This will allow the pdf to download.

NOTES



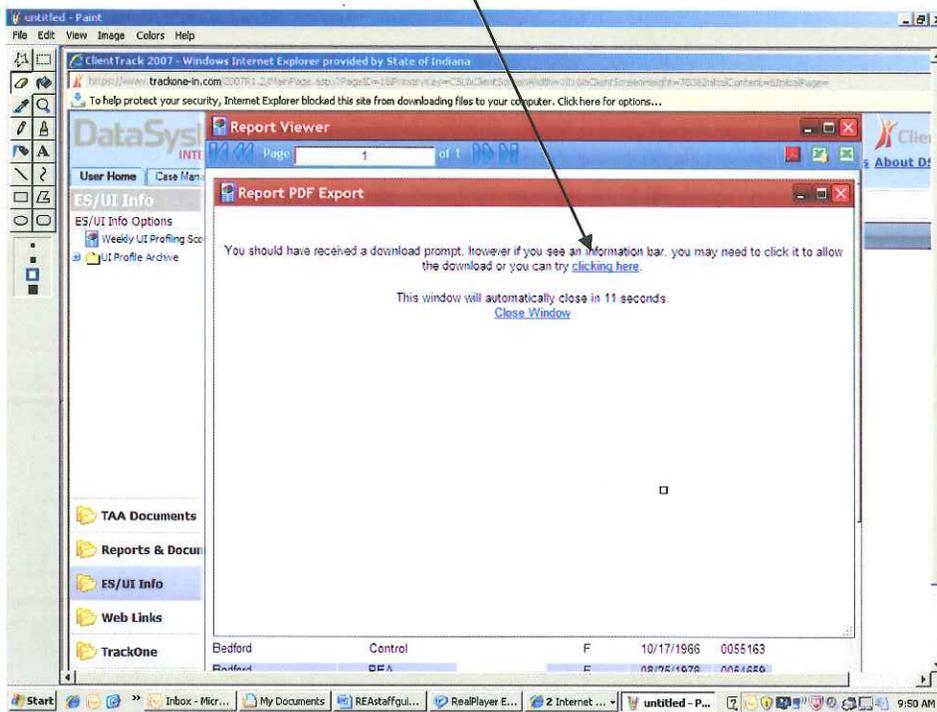
8. To export your list to Excel for mail merge, click on the Excel icon.



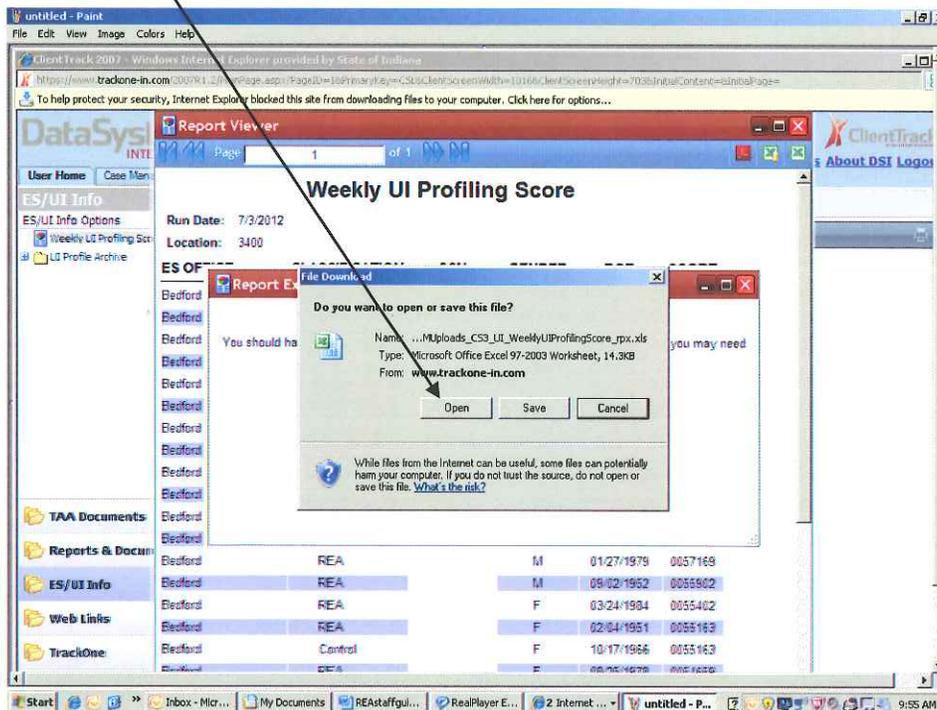
Attachment J

9. Wait for Report Excel Export, or "Click here" to allow the download if needed.

NOTES



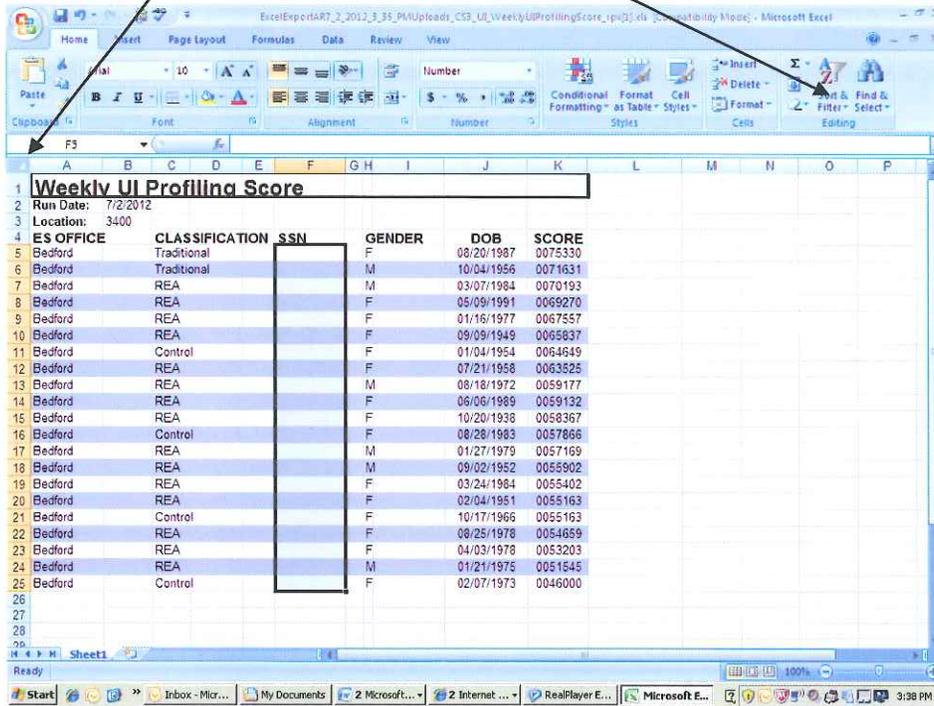
10. Click "Open."



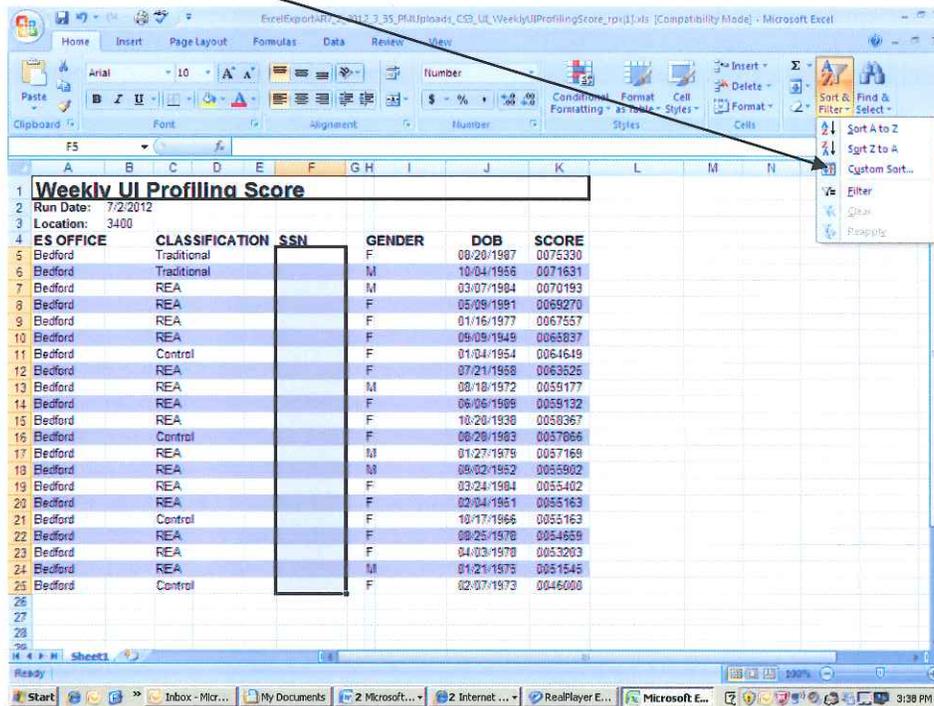
Attachment J

11. You should sort your list before saving. Highlight the spreadsheet by clicking on the box in the left hand corner. Click on "Sort and Filter".

NOTES



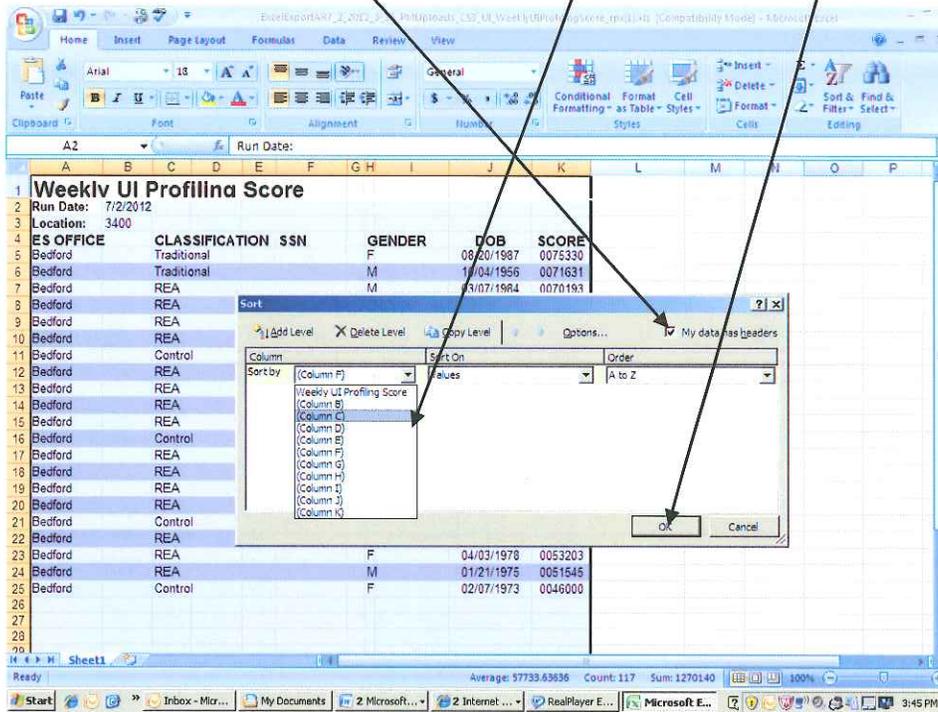
12. Click "Custom Sort."



Attachment J

13. Click on "My data has headers." Select "Sort by Column C." Click "OK."

NOTES



14. Next, you will work through your weekly list to identify claimants who are eligible for "Exemption." See page 14 for the Exemption process. Please use a different color in the highlighting function to identify "Exempt" individuals on your Excel spreadsheet. All claimants *without* a highlight color will be the "Letter Sent" group.

15. To capture the address information for those who will need to be sent a notification letter, go into Cadet and print screen KCE420 for each selectee. You will need to save this sheet in the claimants file folder to document the current address at time of notification. Please use this address rather than the one in TrackOne as it should be the most accurate source. Claimants are required to update their contact information in Uplink within 48 hours of changes. Cadet will have this information quicker than TrackOne. Add the address information to your spreadsheet for all claimants who are being sent Notification letters.

Be sure to save 2 copies of the spreadsheet using a name that indicates the date range and use of the spreadsheet. You will need one for reporting your weekly numbers, and one to generate orientation letters.

For example, for week ending July 14, 2012, you could "name" one worksheet "14 JULY 12 Report" and the other "14 JULY 12 Letters." Remember, for REA/WPRS, we always use the WEEK ENDING dates for documentation purposes because we are a UI-based program.

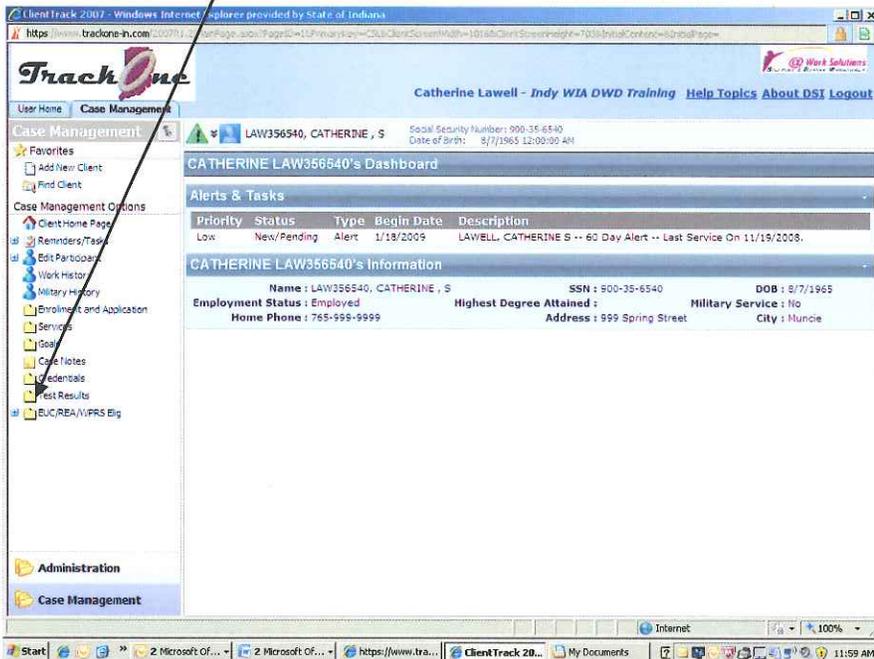
Attachment J

Eligibility/Selection Process

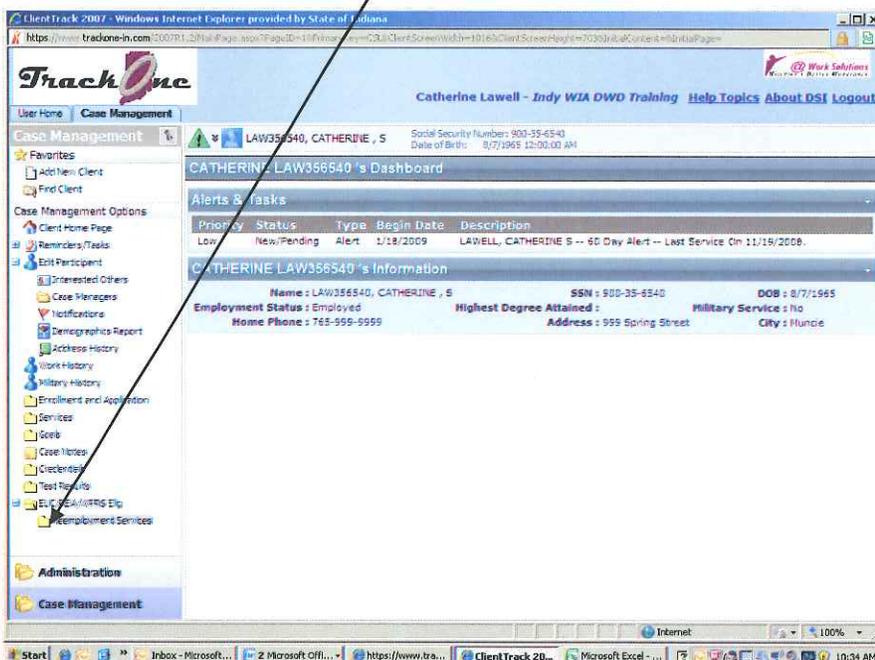
1. Log into TrackOne using Workgroup "Reemployment Services".
All claimants will need to have a service (flag) entered for program participation. Use your list to identify claimants by program designation and enter the applicable "Selection for ..." service in TrackOne. To do this, click on "EUC/REA/WPRS Elig" folder. Select the proper program eligibility group: REA, WPRS, EUCREA, and "save."

NOTES

Each User must have access to the Workgroup. Please contact the Help Desk if you are not on the EUCREA Workgroup list.



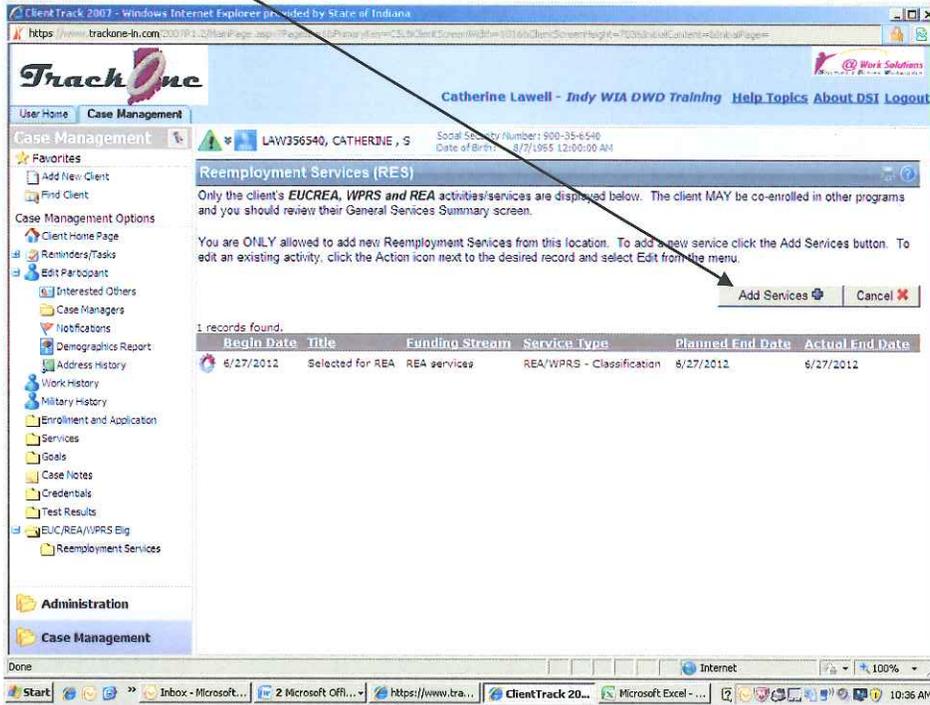
2. Then click on the "Reemployment Services" folder.



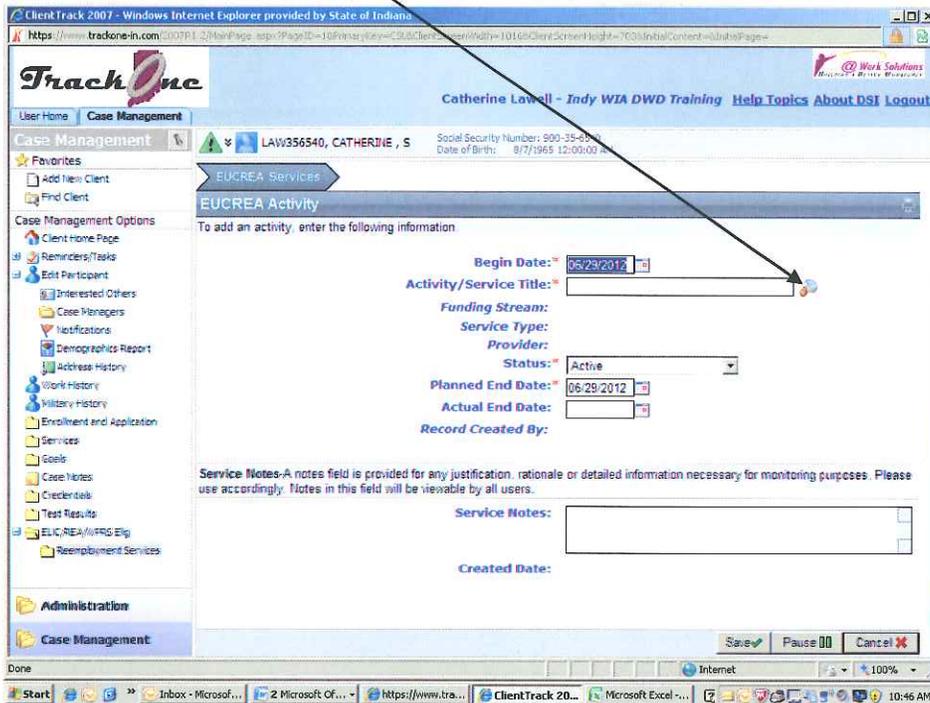
Attachment J

3. Click "Add Services."

NOTES



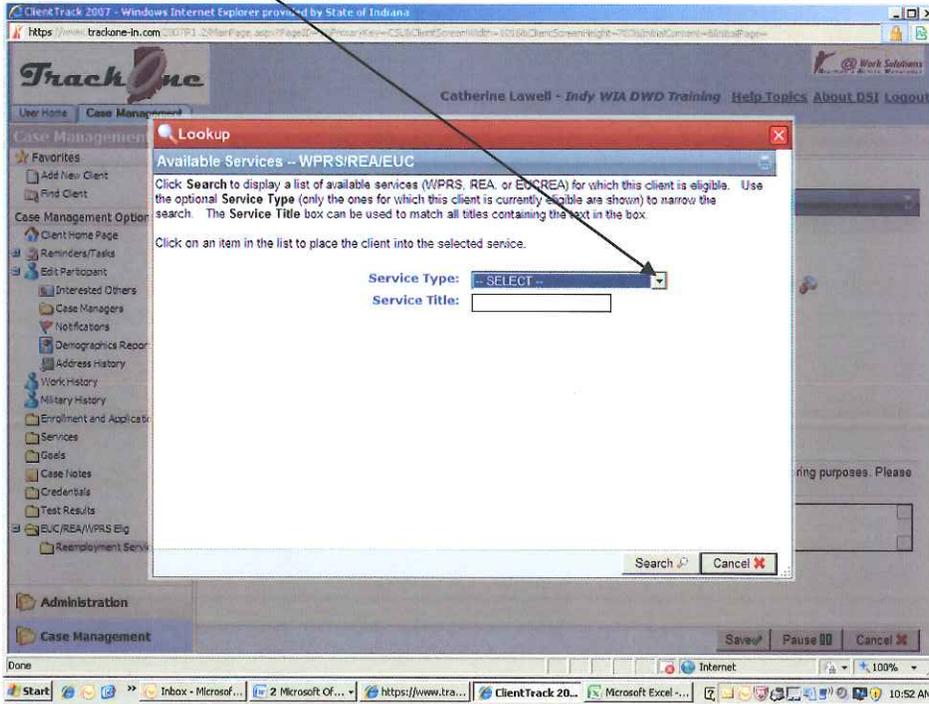
4. Click on the magnifying glass.



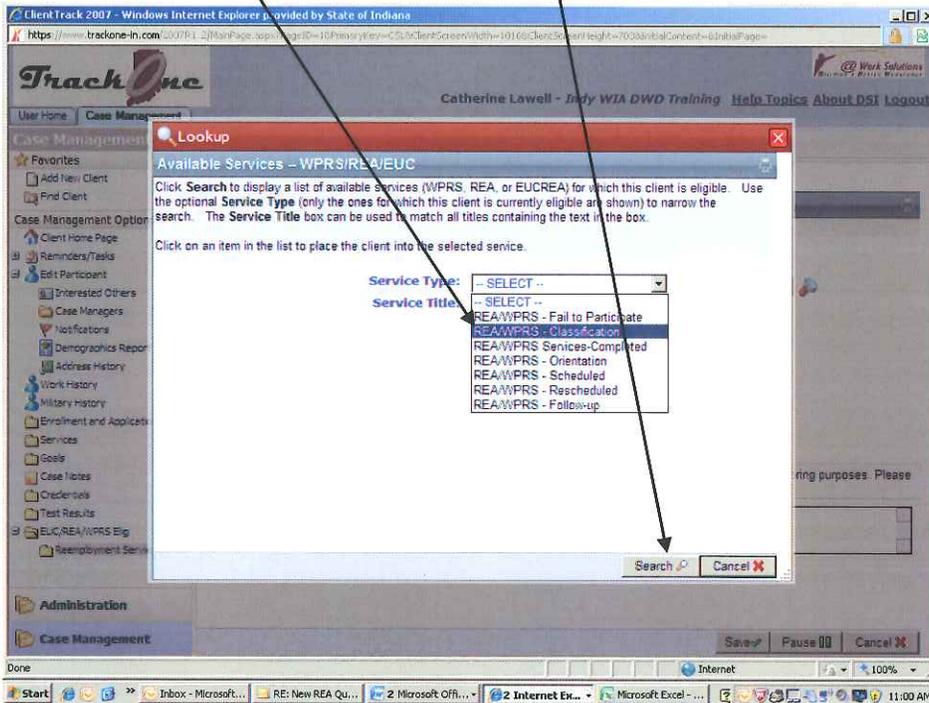
Attachment J

5. Click on "Service Type" dropdown box.

NOTES



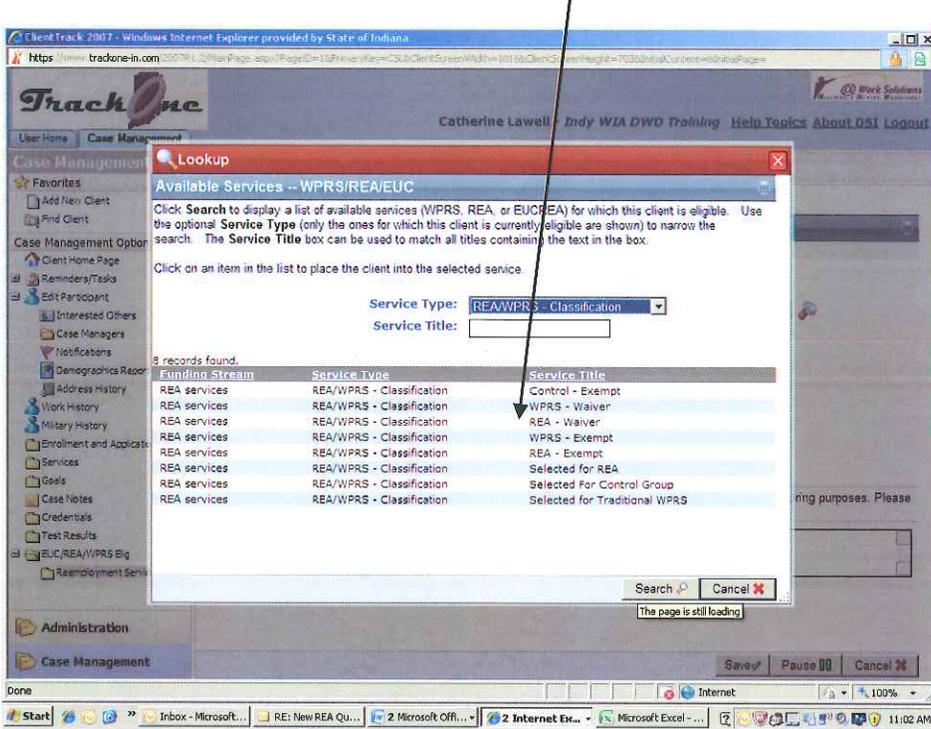
6. Click on "REA/WPRS-Classification", then "Search" button.



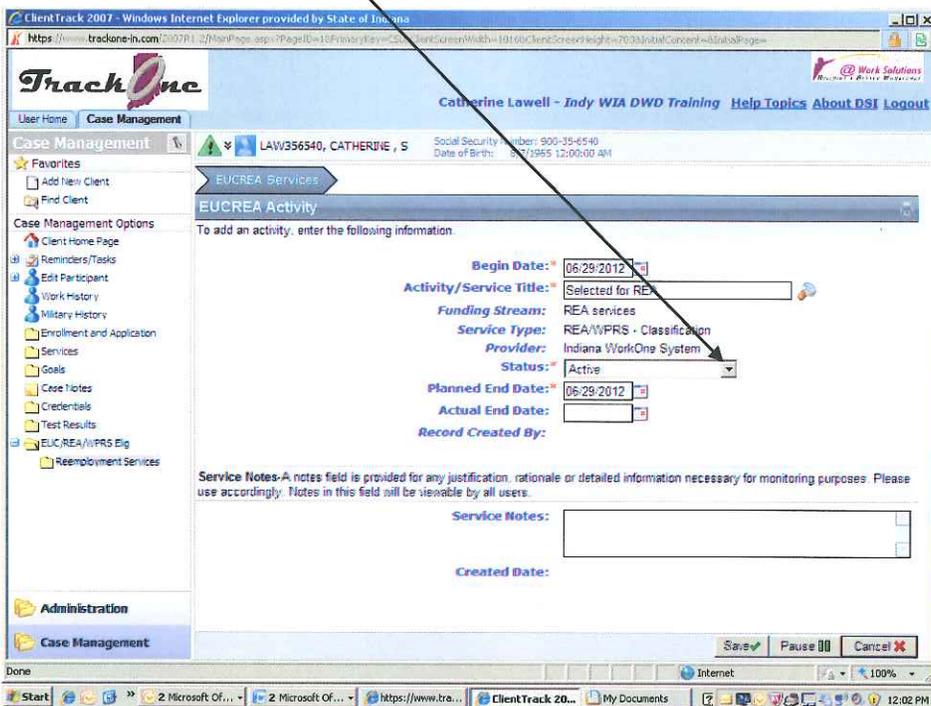
Attachment J

7. Click on the appropriate "Selected for ... Service Title" (by REA, WPRS or Control).
If you fail to enter this service, you will NOT get credit for any services that follow.

NOTES



8. Click dropdown box on "Status"



Attachment J

9. Click on "Completed." Enter today's date as "Actual End Date", then click "Save."

NOTES

The screenshot shows the TrackOne web application interface. The user is logged in as Catherine Lawell. The main content area displays the 'EUCREA Activity' form. The 'Actual End Date' dropdown menu is open, showing the following options: Active, -- SELECT --, Active, Completed, Terminated/Revoked, Withdrew Before Completing, Referred/Waiting, Scheduled, Unsuccessful Completion, and Failed to report. The 'Completed' option is selected. The 'Save' button is highlighted at the bottom right of the form.

Begin Date:	06/29/2012
Activity/Service Title:	Selected for REA
Funding Stream:	REA services
Service Type:	REA/WPRS - Classification
Provider:	Indiana WorkOne System
Status:	Active
Planned End Date:	-- SELECT --
Actual End Date:	Completed
Record Created By:	
Service Notes:	
Created Date:	

Case Note Entry

Case notes must be entered as the RES Services are entered in TrackOne.

1. Enter a case note for "Selection for REA, WPRS, or Control- Classification" by clicking on the "Case Notes" folder.

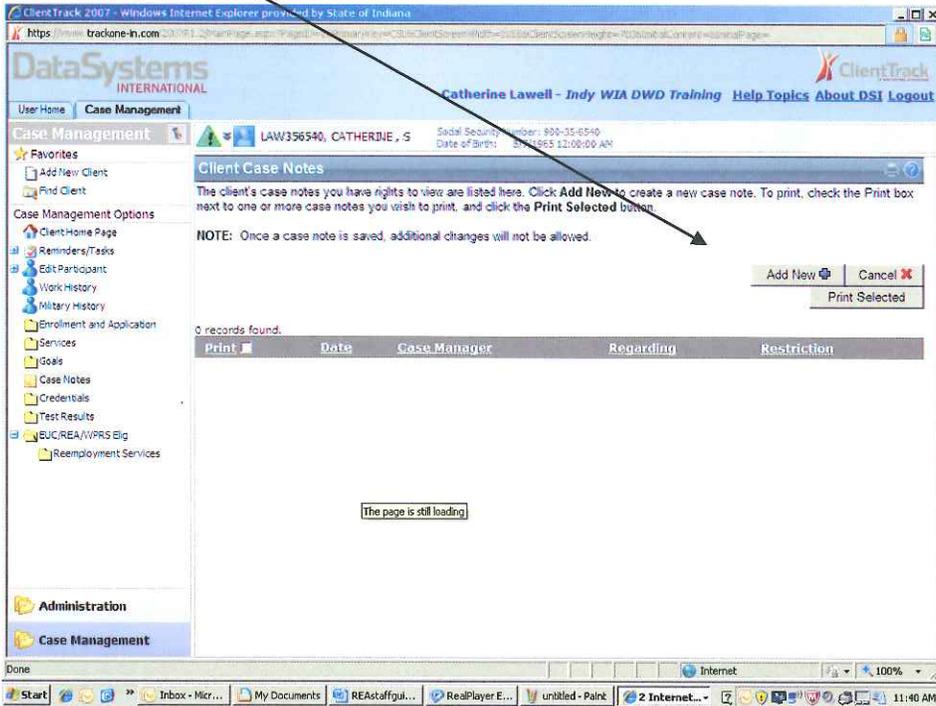
The screenshot shows the TrackOne web application interface. The user is logged in as Catherine Lawell. The main content area displays the 'Reemployment Services (RES)' page. The 'Case Notes' folder is selected in the left sidebar. A table displays one record for a service titled 'Selected for REA'.

Begin Date	Title	Funding Stream	Service Type	Planned End Date	Actual End Date
6/27/2012	Selected for REA	REA services	REA/WPRS - Classification	6/27/2012	6/27/2012

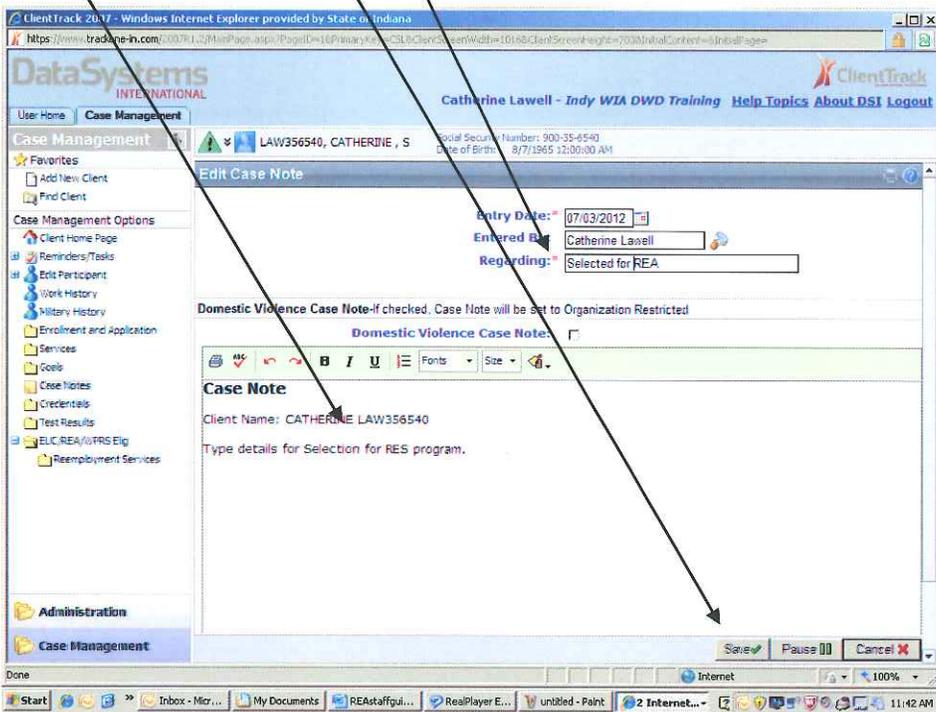
Attachment J

2. Click on "Add New."

NOTES



12. Type in description in "Regarding" box: ex: "Selected for REA." Add details in "Case Note" box and click "Save."



Attachment J

Go thru all of these steps for each person as they are scheduled for and complete each assigned activity: (Selection, Scheduled for Orientation, Scheduled for Assessment, REA/WPRS Completed Orientation, REA/WPRS Skills Assessment Completed, REA/WPRS Assessment Interview- Scheduled, REA/WPRS Assessment Interview-Completed, etc.)

NOTES

Exemption

1. Once a claimant has been selected for participation, you must determine if they are eligible for "Exemption." Utilize the "Guidance for Granting Exemptions and Waivers Under the REA/WPRS/Control Programs" document to determine which claimants are eligible for an exemption. To review for possible exemption due to receiving similar services within 90 days, click on the "Services" folder.

The screenshot displays the ClientTrack 2007 web application interface. The browser window title is "ClientTrack 2007 - Windows Internet Explorer provided by State of Indiana". The URL is "https://www.trackone-in.com/TrackOnePage.aspx?PageID=1&PrintMode=ClientScreenWidth=101&ClientScreenHeight=703&TrackContract=61761&Page=...". The application header includes the "TrackOne" logo and the user name "Catherine Lawell - Indy WIA DWD Training". The main navigation menu includes "User Home" and "Case Management". The "Case Management" section is active, showing details for client "LAW356540, CATHERINE, S" with Social Security Number "900-35-6540" and Date of Birth "3/7/1965 12:00:00 AM". The "Reemployment Services (RES)" section is displayed, with a message: "Only the client's EUCREA, WPRS and REA activities/services are displayed below. The client MAY be co-enrolled in other programs and you should review their General Services Summary screen." Below this message, there is a button "Add Services" and a "Cancel" button. A table shows "2 records found" with the following data:

Begin Date	Title	Funding Stream	Service Type	Planned End Date	Actual End Date
6/27/2012	Selected for REA	REA services	REA/WPRS - Classification	6/27/2012	6/27/2012

The application footer shows the Windows taskbar with the Start button, several open applications (Microsoft Word, Internet Explorer, ClientTrack, My Documents), and the system clock showing "12:31 PM".

Attachment J

2. Review the list of services and dates to determine if claimant has received intensive WIA, TAA, or REA/WPRS within the last 90 days. If YES, they are eligible for "EXEMPTION."

NOTES

The screenshot shows the 'Activities' section of the ClientTrack 2007 interface. It displays a table of 49 records for client LAW356540, CATHERINE, S. The table columns are: Begin Date, Title, Funding Stream, Service Type, Line Code, Planned End Date, and Actual End Date. The first row shows a record for 'Selected for REA' on 6/27/2012. Other rows include 'Workshop - Job Search', 'Staff-assisted - Job Search', 'CS3-Obtained Emp - Automated Labor Exchange', '1-on-1 Counseling and Career Planning', 'Resume Prep', and 'Work w/ client to develop job search plan'.

Begin Date	Title	Funding Stream	Service Type	Line Code	Planned End Date	Actual End Date
6/27/2012	Selected for REA	REA services	REA/WPRS - Classification		6/27/2012	6/27/2012
11/19/2008	Workshop - Job Search	WIA-Adult	Staff Assisted Job Search	CS	11/19/2008	11/19/2008
11/6/2008	Workshop - Job Search	WIA-Adult	Staff Assisted Job Search	CS	11/6/2008	11/6/2008
9/12/2008	Staff-assisted - Job Search	WIA-Adult	Staff Assisted Job Search	CS	9/12/2008	9/12/2008
9/8/2008	CS3-Obtained Emp - Automated Labor Exchange	Wagner-Peyser	Wagner-Peyser Service - Does Not Extend Exit		9/8/2008	9/8/2008
7/28/2008	1-on-1 Counseling and Career Planning	WIA-Adult	Counseling and Career Planning	N4	7/28/2008	7/28/2008
7/14/2008	Workshop - Job Search	WIA-Adult	Staff Assisted Job Search	CS	7/14/2008	7/14/2008
7/8/2008	Resume Prep	Wagner-Peyser	Staff Assisted Job Search	CS	7/8/2008	7/8/2008
7/2/2008	Resume Prep	Wagner-Peyser	Staff Assisted Job Search	CS	7/2/2008	7/2/2008
7/2/2008	Work w/ client to develop job search plan	WIA-Adult	Employment Plan	N2	7/2/2008	7/2/2008
7/1/2008	Self-help - Assessment - Generic	Wagner-Peyser	Informational/Self-Service	C9	7/1/2008	7/1/2008
7/1/2008	1-on-1 Counseling and Career Planning	Wagner-Peyser	Counseling and Career Planning	N4	7/1/2008	7/1/2008

3. If the claimant is eligible for exemption, you will need to enter an "Exempt" service. Click on "Reemployment Services." folder. Then Click "Add Services."

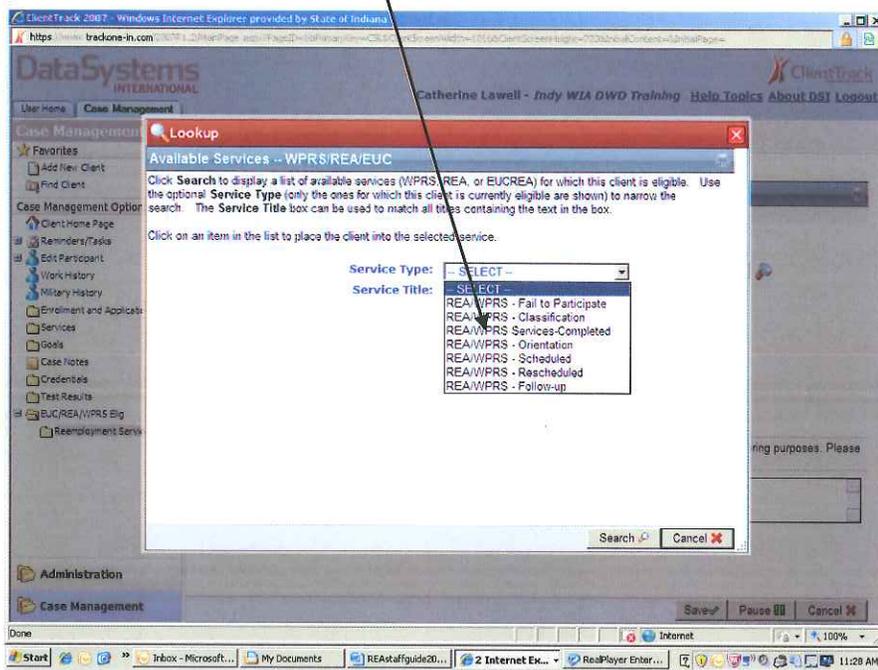
The screenshot shows the 'Reemployment Services (RES)' section of the ClientTrack 2007 interface. It displays a table of 2 records for client LAW356540, CATHERINE, S. The table columns are: Begin Date, Title, Funding Stream, Service Type, Planned End Date, and Actual End Date. The first row shows a record for 'Selected for REA' on 6/27/2012. The 'Add Services' button is highlighted with a red box.

Begin Date	Title	Funding Stream	Service Type	Planned End Date	Actual End Date
6/27/2012	Selected for REA	REA services	REA/WPRS - Classification	6/27/2012	6/27/2012

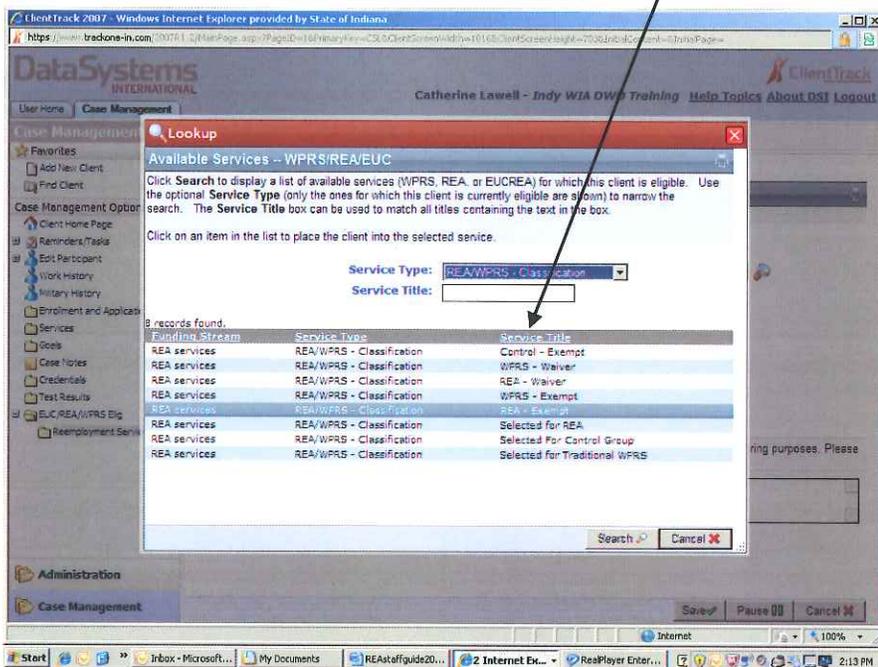
Attachment J

NOTES

6. Click on REA/WPRS-Classification type



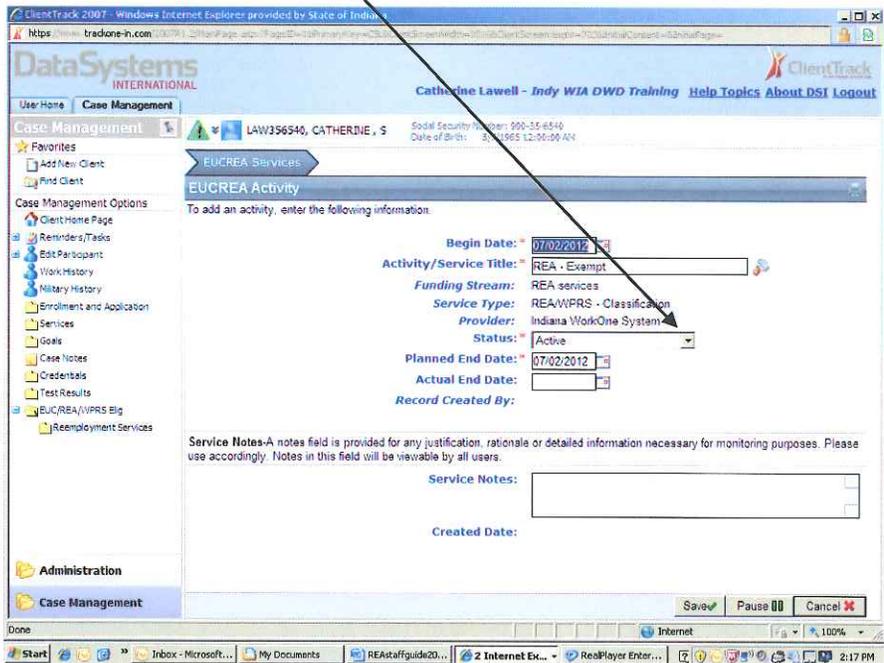
7. Select the appropriate Service title: either "REA, WPRS, or Control -Exempt."



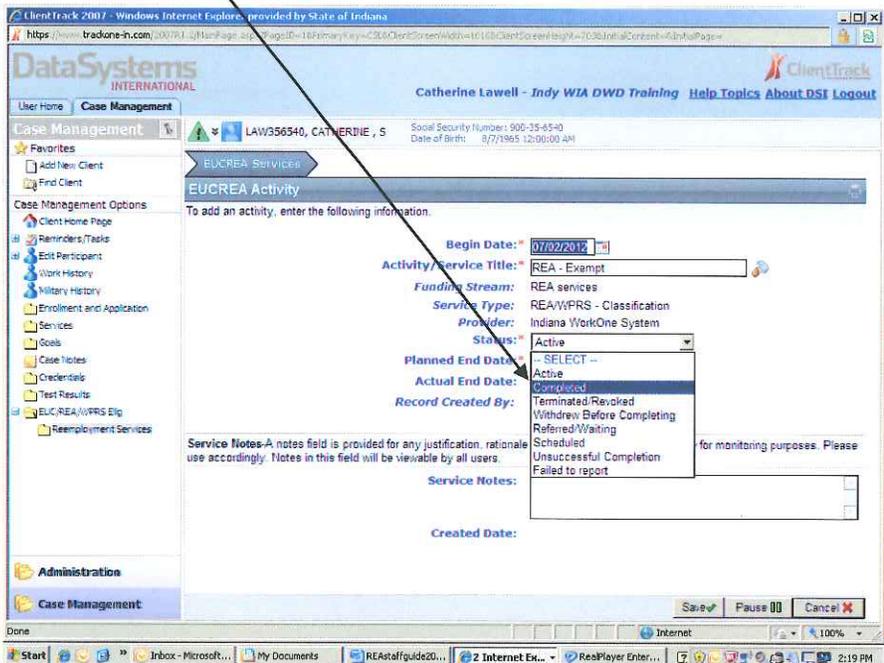
Attachment J

8. Click dropdown box on "Status"

NOTES



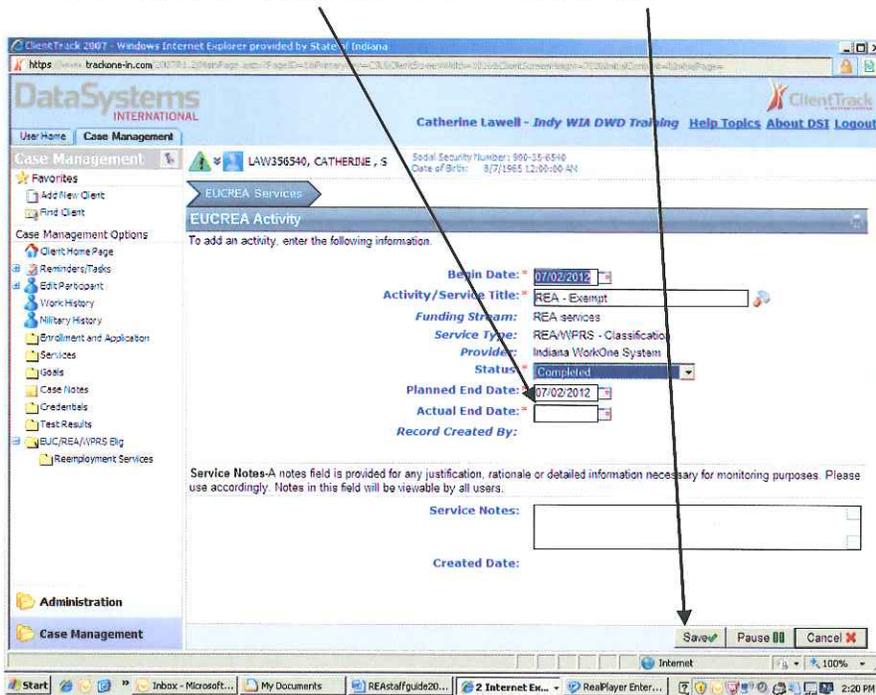
9. Click on "Completed."



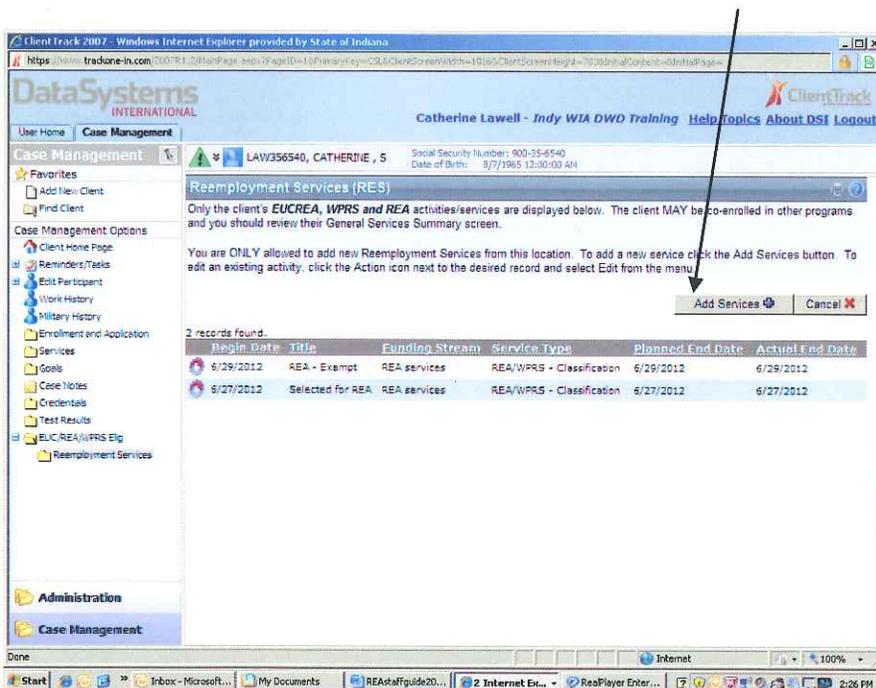
Attachment J

10. Enter the "Actual End Date" in the data field. (Note: The "Actual End Date" will be the same as "Planned End Date.") Then click "Save."

NOTES



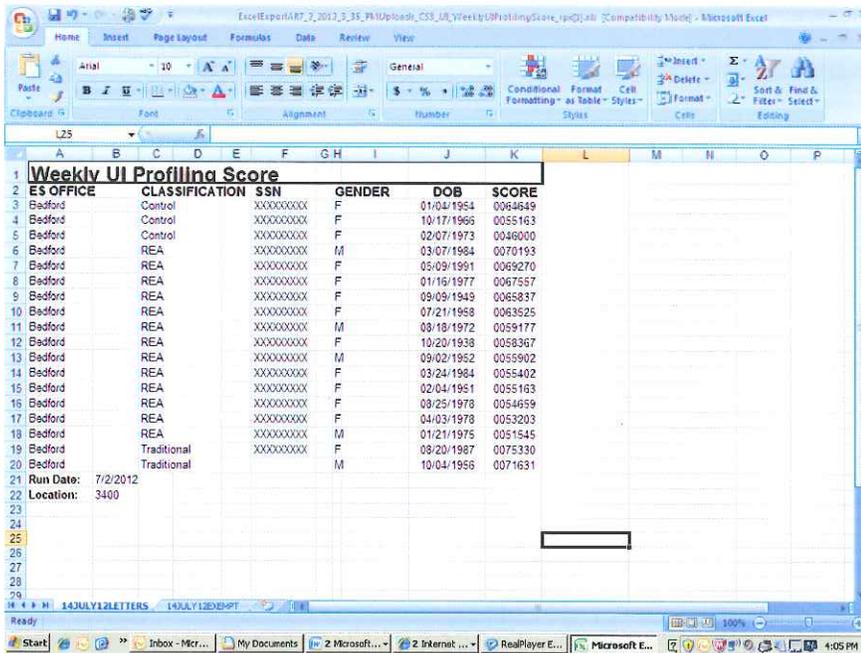
11. Please note that only the client's Reemployment (REA, WPRS, Control, or EUCREA) Services will be displayed on this screen. The client MAY be co-enrolled in other programs and you MUST review their General Summary screen. You are ONLY allowed to add new Reemployment Services from this location.



Attachment J

16. Follow the instructions on how to complete the mail merge in the "Mail Merge Instructions for Reemployment Services" document.

NOTES



The screenshot shows a Microsoft Excel spreadsheet with the following data:

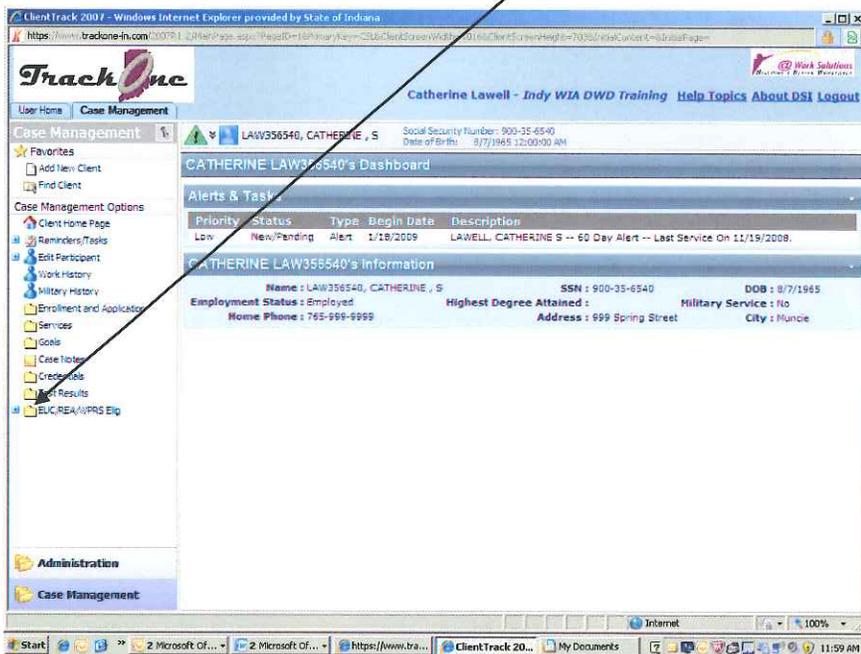
ES OFFICE	CLASSIFICATION	SSN	GENDER	DOB	SCORE
Badford	Control	XXXXXXXXXX	F	01/04/1954	0094649
Badford	Control	XXXXXXXXXX	F	10/17/1966	0055163
Badford	Control	XXXXXXXXXX	F	02/07/1973	0046000
Badford	REA	XXXXXXXXXX	M	03/07/1984	0070193
Badford	REA	XXXXXXXXXX	F	05/09/1991	0069270
Badford	REA	XXXXXXXXXX	F	01/16/1977	0067557
Badford	REA	XXXXXXXXXX	F	09/09/1949	0065837
Badford	REA	XXXXXXXXXX	F	07/21/1958	0063525
Badford	REA	XXXXXXXXXX	M	08/18/1972	0059177
Badford	REA	XXXXXXXXXX	F	10/20/1938	0058367
Badford	REA	XXXXXXXXXX	M	09/02/1962	0059902
Badford	REA	XXXXXXXXXX	F	03/24/1984	0055402
Badford	REA	XXXXXXXXXX	F	02/04/1951	0055163
Badford	REA	XXXXXXXXXX	F	09/25/1978	0054559
Badford	REA	XXXXXXXXXX	F	04/03/1978	0053203
Badford	REA	XXXXXXXXXX	M	01/21/1975	0051545
Badford	Traditional	XXXXXXXXXX	F	08/20/1987	0075330
Badford	Traditional	XXXXXXXXXX	M	10/04/1956	0071631

Additional information at the bottom of the spreadsheet:

- Run Date: 7/2/2012
- Location: 3400

Scheduled for Orientation

1. Once you have completed your Orientation letters, you will need to enter the "Scheduled for Orientation", and "Scheduled Skills Assessment" services in TrackOne. To do this, click on "EUC/REA/WPRS Elig" folder.



The screenshot shows the TrackOne web application interface. The user is logged in as Catherine Lawell - Indy WIA DWD Training. The interface includes a navigation menu on the left with options like Case Management, Administration, and Case Management. The main content area displays the dashboard for Catherine Law355540, including alerts and tasks. A specific alert is shown: "Low New/Pending Alert: 1/18/2009 LAWELL, CATHERINE S -- 60 Day Alert -- Last Service On 11/19/2008." Below the alert, there is a section for "CATHERINE LAW355540's Information" with details such as Name, SSN, DOB, Employment Status, Home Phone, Address, and City.

Attachment J

2. Then click on the "Reemployment Services" folder.

NOTES

The screenshot shows the ClientTrack 2007 web application interface. The left-hand navigation pane is expanded to show the 'Reemployment Services' folder, which is highlighted. The main content area displays the dashboard for Catherine Lawell, including an 'Alerts & Tasks' section with a table of alerts and a 'Catherine Lawell's Information' section with personal and contact details.

Priority	Status	Type	Begin Date	Description
Low	New/Pending	Alert	1/18/2009	LAWELL, CATHERINE S -- 60 Day Alert -- Last Service On 11/19/2008.

CATHERINE LAW356540's Information

Name	LAW356540, CATHERINE, S	SSN	900-35-6540	DOB	8/7/1965
Employment Status	Employed	Highest Degree Attained		Military Service	No
Home Phone	765-999-9999	Address	999 Spring Street	City	Muncie

3. Click "Add Services."

The screenshot shows the 'Reemployment Services (RES)' screen in ClientTrack 2007. The main content area contains instructions for adding services and a table of existing services. The 'Add Services' button is highlighted with a black arrow.

Only the client's **EUCREA, WPRS and REA** activities/services are displayed below. The client **MAY** be co-enrolled in other programs and you should review their General Services Summary screen.

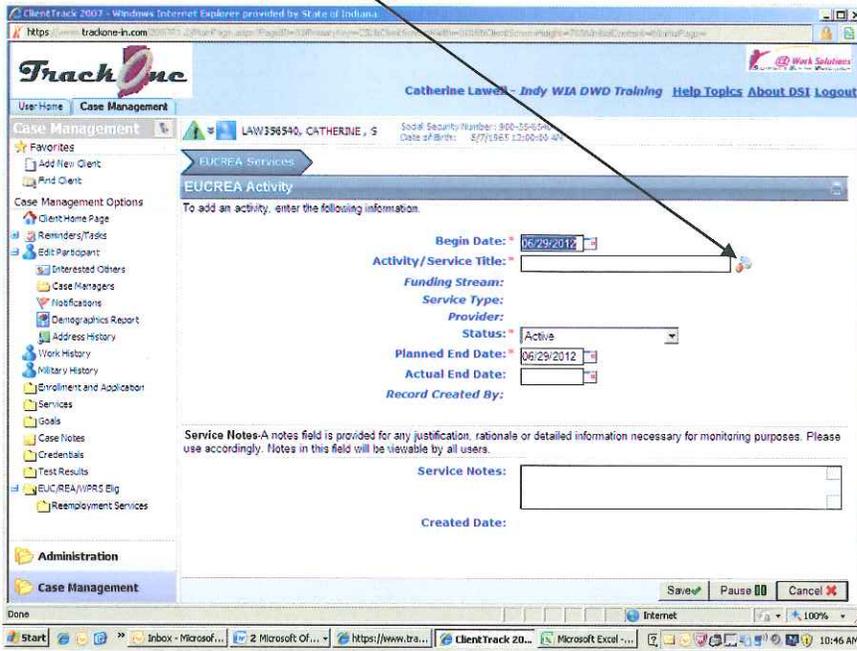
You are **ONLY** allowed to add new Reemployment Services from this location. To add a new service click the Add Services button. To edit an existing activity, click the Action icon next to the desired record and select Edit from the menu.

Begin Date	Title	Funding Stream	Service Type	Planned End Date	Actual End Date
6/27/2012	Selected for REA	REA services	REA/WPRS - Classification	6/27/2012	6/27/2012

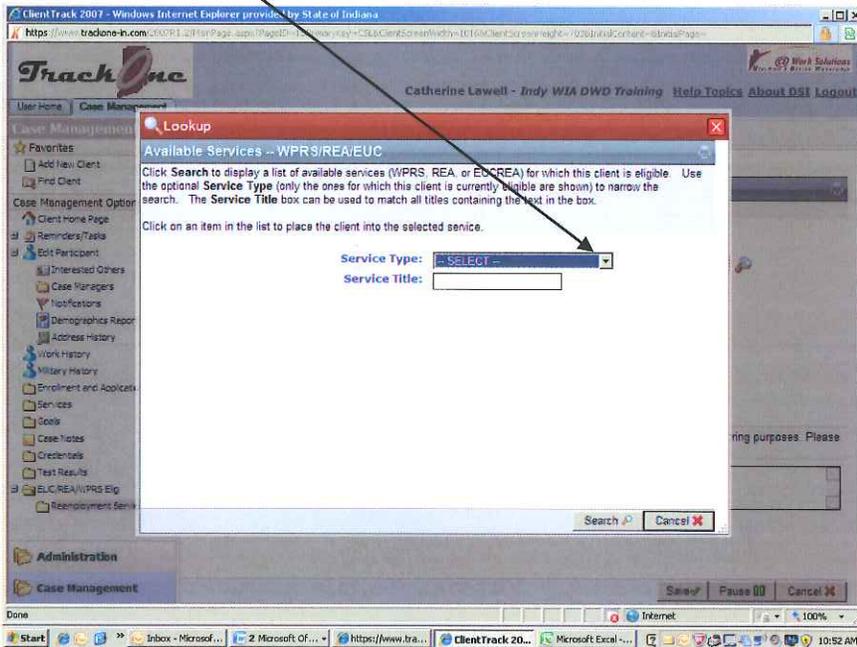
Attachment J

4. Click on the magnifying glass.

NOTES



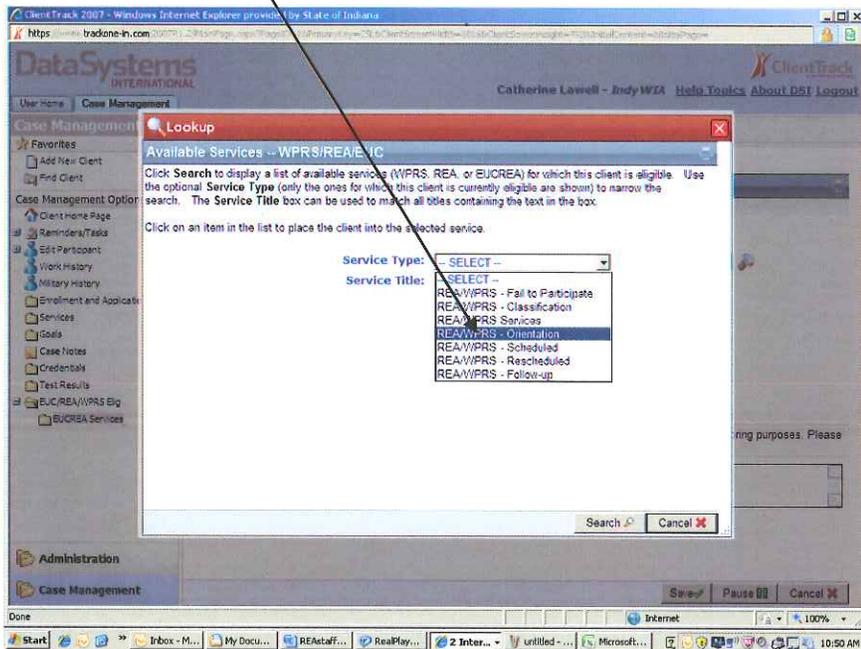
5. Click on "Service Type" dropdown box.



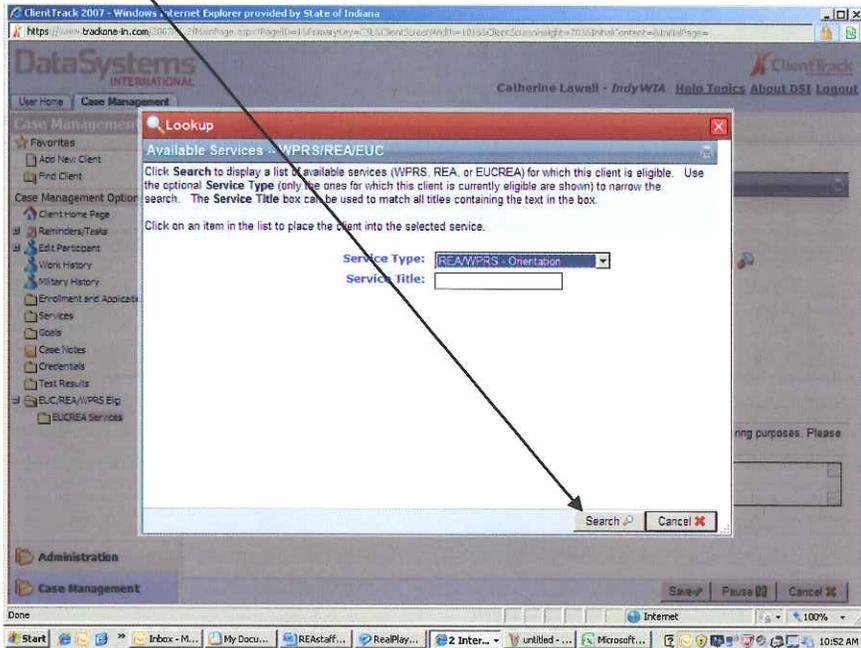
Attachment J

6. Select "REA/WPRS-Orientation."

NOTES



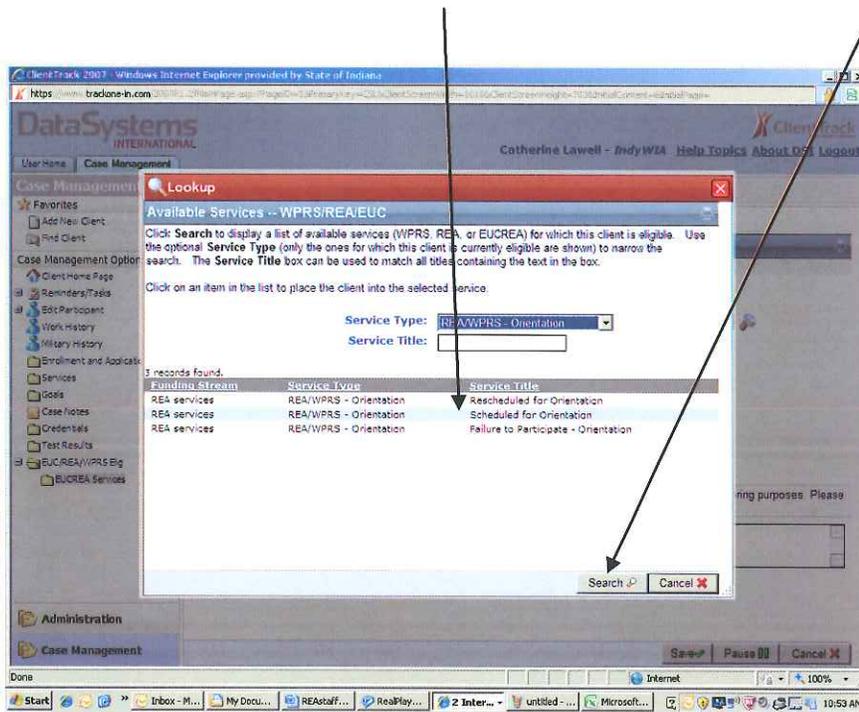
7. Click "Search."



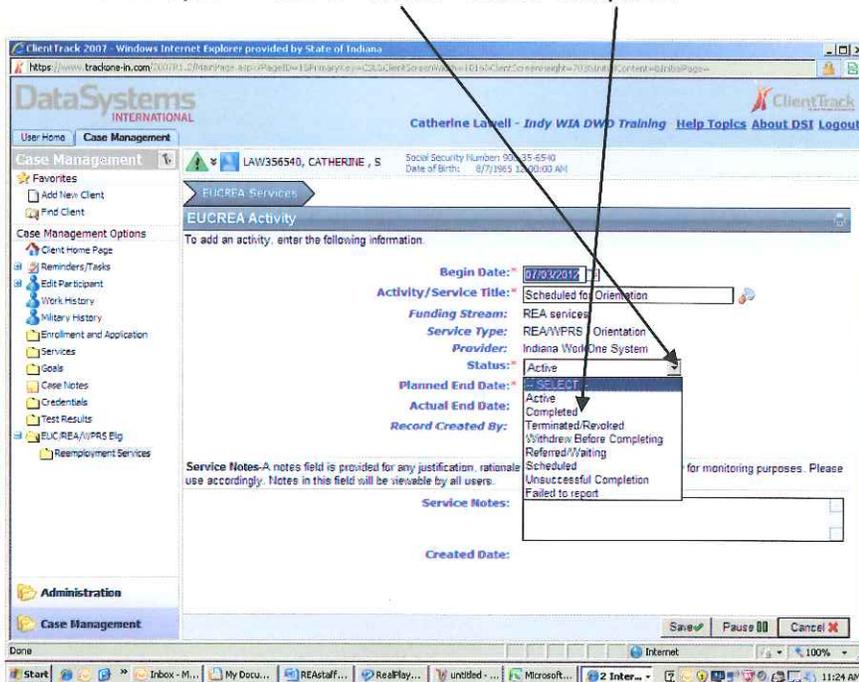
Attachment J

8. Select "REA/WPRS-Orientation Scheduled for Orientation." Then click "Search."

NOTES



9. Click the dropdown box for "Status." Select "Completed"



Attachment J

11. Enter the "Actual End Date" as the same as the "Planned End Date."
Then click on "Save."

NOTES

The screenshot shows the ClientTrack 2007 web application interface. The user is logged in as Catherine Lawell - Indy WIA DWD Training. The page displays the 'EUCREA Activity' form. The form fields are as follows:

- Begin Date: 07/03/2012
- Activity/Service Title: Scheduled for Orientation
- Funding Stream: REA services
- Service Type: REA/WPRS - Orientation
- Provider: Indiana WorkOne System
- Status: Completed
- Planned End Date: 07/03/2012
- Actual End Date: 07/03/2012
- Record Created By: (empty)

Below the form, there is a 'Service Notes' field and a 'Created Date' field. The 'Save' button is highlighted with a red arrow pointing to it from the instruction above.

Next you must now enter the services and case notes for "Scheduled for Orientation" and "Scheduled for Assessment." You may enter this as a combined case note since both are part of the Notification process.

All REA/WPRS services can be entered in the same manner as the one for "Selection...." The following is a list of services that will be entered according to activity for all RES selectees:

Classifications:

1. Selected for REA
2. Selected for WPRS
3. Selected for Control
4. Exempt-REA
5. Exempt-WPRS
6. Exempt-Control
7. Waiver-REA
8. Waiver-WPRS

Note: There is NO waiver service for Control group because they are NEVER to be contacted regarding this program.

REA/WPRS Orientation:

1. REA/WPRS-Scheduled for Orientation
2. REA/WPRS-Rescheduled for Orientation
3. REA/WPRS-Failure to Participate

REA/WPRS-Scheduled

1. REA/WPRS-Scheduled- Skills Assessment
2. REA/WPRS-Scheduled-Assessment Interview
3. REA/WPRS-Scheduled-WorkKeys
4. REA/WPRS-Scheduled-Job Search Workshop

Attachment J

5. REA/WPRS-Scheduled-Job Development
6. REA/WPRS-Scheduled-Individual Counseling
7. REA/WPRS-Scheduled-Group Counseling
8. REA/WPRS-Scheduled-Job Finding Club

REA/WPRS-Rescheduled

1. REA/WPRS-Rescheduled- Skills Assessment
2. REA/WPRS-Rescheduled-Assessment Interview
3. REA/WPRS-Rescheduled-WorkKeys
4. REA/WPRS-Rescheduled-Job Search Workshop
5. REA/WPRS-Rescheduled-Job Development
6. REA/WPRS-Rescheduled-Individual Counseling
7. REA/WPRS-Rescheduled-Group Counseling
8. REA/WPRS-Rescheduled-Job Finding Club

REA/WPRS- Failure to Participate

1. REA/WPRS -Skill Assessment-FTP
2. REA/WPRS-Work Search Reporting-FTP (Bi-weekly Logs)
3. REA/WPRS-REA Signed Services Waiver-FTP (Refusal to Participate in REA)
4. REA/WPRS-Job Search Workshop-FTP
5. REA/WPRS-Job Finding Club-FTP
6. REA/WPRS-Job Development-FTP
7. REA/WPRS-Individual Counseling-FTP
8. REA/WPRS-Assessment Interview (One-on-One)-FTP

REA/WPRS-Services Completed

1. REA/WPRS -Skill Assessment-Completed
2. REA/WPRS- Orientation- Completed
3. REA/WPRS-Assessment Interview - Completed
4. REA/WPRS-Job Search Workshop- Completed
5. REA/WPRS-Job Finding Club- Completed
6. REA/WPRS-Job Development- Completed
7. REA/WPRS-Individual Counseling- Completed
8. REA/WPRS-Group Counseling- Completed
9. REA/WPRS-WorkKeys- Completed
10. REA/WPRS-Completed Service Strategy (Individual Service Plan-IRP)

REA/WPRS Follow Up

1. REA/WPRS Follow Up Biweekly Participation Log Submission

Remember to follow each entered RES service with a case note to document all details of the service or activity that was posted. Make sure the date of the case note matches the date of the service posted.

Attachment K:
Mail Merge Instructions for Reemployment Services Notification Letters

Mail Merge Instructions for Reemployment Services Notification Letters (Microsoft Word)

NOTE: Mail Merge instructions are being included for Excel and Word. Local offices may utilize which ever version best works for them.

1. Start by pulling up the standard approved letter;
2. Change the date at the top to that Monday's date;
3. Change the date of the orientation within the body of the letter;
4. Click on "Mailing" tab at the top;
5. Click on "Start mail merge";
6. Click on "Step-by-step mail merge wizard"
7. A pop-up will appear on the right hand side of the screen;
8. Click next (as the "document" – or 1st step -is already up");
9. Click on "Select recipients";
10. Edit the recipient list before you get started by deleting the appropriate fields (e.g., email, country, etc.);
11. The only five (5) mail merge fields you should have to complete are: First Name, Last Name, Address, City and Zip Code;
12. Enter each selected recipient's 5 fields;
13. Save recipient list (e.g., "032812selectees");
14. This should bring you back to the main document (RES Orientation letter);
15. Delete the name, address, city, zip code and first name after "Dear _____:";
16. Put your cursor where the "first name" would go";
17. Click on the "Insert Mail Merge Field" and click on "First Name";
18. Hit the space bar once;

Attachment K:
Mail Merge Instructions for Reemployment Services Notification Letters

19. Click on the “Insert Mail Merge Field” again and click on “Last Name”;
20. Position your cursor where the address line is;
21. Click on the “Insert Mail Merge Field” again and click on “Address”;
22. Position the cursor where you would put the city;
23. Click on the “Insert Mail Merge Field” again and click on “City”;
24. Type in a comma and a space after the city, type in “Indiana” and then another space;
25. Click on the “Insert Mail Merge Field” again and click on “Zip Code”;
26. Position cursor after Dear(space);
27. You should see the option on the right hand side of the screen to merge letters; and
28. Then ***save all letters*** after merge as its own separate document (this process is repeated weekly)

Attachment L
Mail Merge for RES Notification Letters (Excel 2010 instructions)

Mail Merge for REA Notification Letters (Excel 2010 instructions)

1. Start by pulling up the standard approved letter;
2. Change the date at the top to that Monday's date;
3. Change the date of the orientation within the body of the letter;
4. Click on "Mailing" tab at the top;
5. Click on "Start mail merge";
6. Click on "Step-by-step mail merge wizard";
7. A pop-up will appear on the right hand side of the screen;
8. Click next (as the "document" – or 1st step -is already up");
9. Click on "Select recipients";
10. Edit the recipient list before you get started by deleting the appropriate fields (e.g., email, country, etc.);
11. The only five (5) mail merge fields you should have to complete are: First Name, Last Name, Address, City and Zip Code;
12. Enter each selected recipient's 5 fields;
 - a. Save recipient list (e.g., "032812selectees");
13. This should bring you back to the main document (RES Orientation letter);
14. Delete the name, address, city, zip code and first name after "Dear _____:";
15. Put your cursor where the "first name" would go";
16. Click on the "Insert Mail Merge Field" and click on "First Name";
17. Hit the space bar once;
18. Click on the "Insert Mail Merge Field" again and click on "Last Name";
19. Position your cursor where the address line is;

Attachment L

Mail Merge for RES Notification Letters (Excel 2010 instructions)

20. Click on the “Insert Mail Merge Field” again and click on “Address”;
21. Position the cursor where you would put the city;
22. Click on the “Insert Mail Merge Field” again and click on “City”;
23. Type in a comma and a space after the city, type in “Indiana” and then another space;
24. Click on the “Insert Mail Merge Field” again and click on “Zip Code”;
25. Position cursor after Dear (space);
26. Click on the “Insert Mail Merge Field” again and click on “First Name”;
27. You should see the option on the right hand side of the screen to merge letters; and
28. Save all letters after merge as its own separate document (this process is repeated weekly).