

Advanced Learning Program Series

Step Two: Genesis Review

Instructor Guide

Goodwill of Central and Northern Arizona

Step Two: Genesis Review

Purpose

The purpose of this course is to provide a basis of knowledge of the Advanced Learning Program.

How to Use This Guide

This instructor guide is designed to help you deliver the Step Two: Genesis Review training. Explanations of what to say, what to do, and how to conduct activities, if applicable are provided within this guide; however, you can use the left side of each page to enter your own notes to help you train this session.

You will also see PG referenced throughout this material, it stands for Participant Guide. References will only be provided when relevant to the training.

Durations are estimates only and may not reflect the final recorded training sessions.

Materials Needed

Use the following materials as you train this session:

- Advanced Learning Genesis Review - Step Two PPT
- Advanced Learning Genesis Review Guide
- Advanced Learning Case Note Documentation Templates Document



Step Two: Genesis Review



Slide 1: Title Slide

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Welcome to the Advanced Learning Genesis Review training. This is Step 2 of the Advanced Learning Program series.

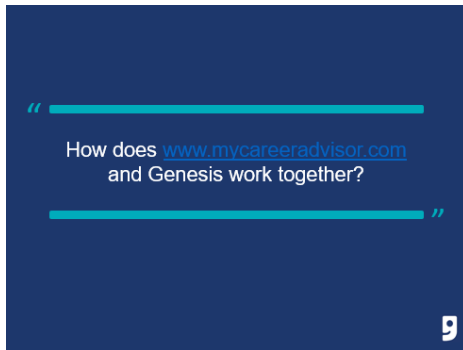
As we mentioned in other training sessions, the enrollment process for the Advanced Learning Program consists of five steps:

- Referral Request
- Genesis Review
- Evaluator Interview
- Program Enrollment
- Follow Up Services

Let's explore **Step Two: Genesis Review**.



Step Two: Genesis Review



Slide 2: Question

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Learners are required to register and create a profile on www.mycareeradvisor.com in order to utilize community resources, training, education, and career development services. The profile details generated from www.mycareeradvisor.com are then transferred to Genesis.

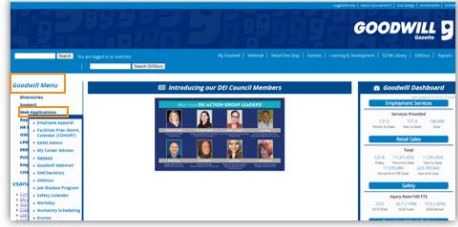
Genesis is the back end or behind the scenes of the [www.mycareeradvisor](http://www.mycareeradvisor.com) website. Goodwill uses Genesis as a case management system. Genesis is secure and is only accessible by Goodwill employees. Currently it is mostly used by the Mission Services Team.

Let's explore how to access Genesis on the next screen.



Step Two: Genesis Review

Accessing Genesis



Slide 3: Accessing Gazette

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

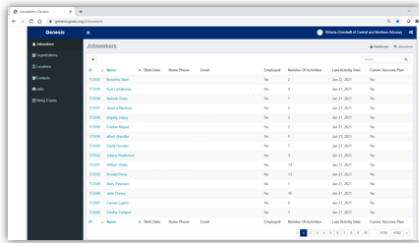
Say: There are many ways to access Genesis. For the purpose of today's training, we will access it through the Goodwill Gazette which is the default internet browser home page for every Goodwill employee.

On the Goodwill Gazette home page, navigate to the Goodwill Menu on the left side of the screen and look for **Web Applications**. Rollover the drop-down menu until it displays all available options. To access Genesis, click the **Genesis** link.

Next, let's take a look at what happens when we open Genesis.

Step Two: Genesis Review

Genesis Initial Login



Say: The opening screen of Genesis will look like this the first time you log in.

On the left side of the screen is a black menu bar with the following categories: Jobseekers, Organizations, Locations, Contacts, Jobs, and Hiring events. This menu bar is accessible no matter where you are in Genesis.

Next, let's look at the main part of the screen. This example shows the Jobseekers page. This page displays all the Learners that have accessed and built a profile on www.mycareeradvisor.com. There are several category details for Learners and information only displays within each category if a Learner has added it or a Goodwill employee has manually entered it. We'll cover these categories later in the training.

Next, let's look at the opening screen for Genesis after the initial login.

Slide 4: Genesis Initial Login

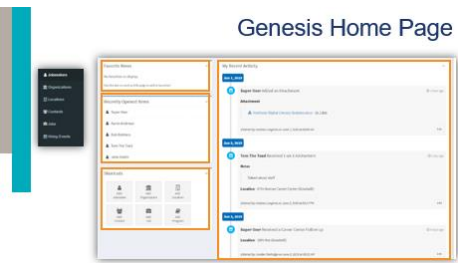
Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:



Step Two: Genesis Review



Slide 5: Genesis Home Page

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: On the left side of the screen is the same menu bar with the following categories: Jobseekers, Organizations, Locations, Contacts, Jobs and Hiring events. As we previously mentioned, this menu bar is accessible no matter where you are in Genesis.

Let's take a look at the main parts of the screen.

There are four 4 sections:

- Favorite Items
- Recently Opened Items
- Shortcuts
- Activity Stream

Here is a brief description of each section:

Favorite Items: Displays pages an employee adds as a favorite; you can click a star on any profile page to add

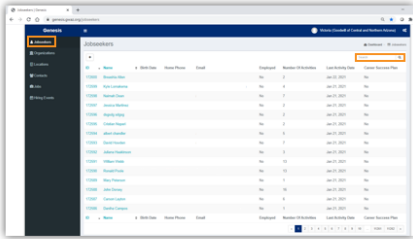
Recently Opened Items: Shows a list of Learners that were last updated or researched

Shortcuts: Allows an employee to add a shortcut to a jobseeker, organization, location, contact, or job

Activity Stream: Shows the most recent work that was completed by an employee or job seeker

Step Two: Genesis Review

Find a Jobseeker/Learner



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Say: To start the Genesis Review process for the Advanced Learning Program, let's begin by locating a jobseeker record. From the left menu bar, click the **Jobseekers** link.

Next, in the top, right search bar, type the jobseeker's Genesis ID number and click the looking glass icon.

Slide 6: Find a Jobseeker/Learner

Estimated duration: 1 minute

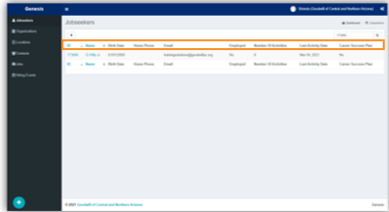
Participant Guide Page: N/A

Notes:



Step Two: Genesis Review

Learner's Profile



Slide 7: Learner's Profile

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: Today's training focuses on the Learner. Profile(s) that match the Genesis ID entered displays. Typically, there is only profile for each Learner. Duplicate profiles are covered later.

Category details for each learner include:

- Genesis ID#
- Name
- Birthdate
- Home phone
- Email
- Employed
- Number of Activities
- Last Activity Date
- Career Success Plan

Most of these categories are self-explanatory; however, a couple require more explanation.

Number of Activities shows the number of times the Learner used www.mycareeradvisor.com or their profile was accessed by a Goodwill staff.

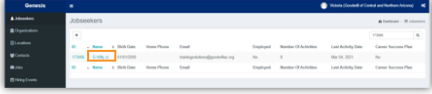
Last Activity Date shows the date and last time the Learner or Goodwill employee accessed the Learner's profile.



Step Two: Genesis Review

Things to Remember

- If Learner doesn't populate with Genesis ID#, add Learner's name
- If both Learner name and Genesis ID# doesn't populate, send email to referring party



To open a Learner's profile, click the jobseeker's name link.

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Slide 8: Things to Remember

Estimated duration: 1 minute

Participant Guide Page: N/A

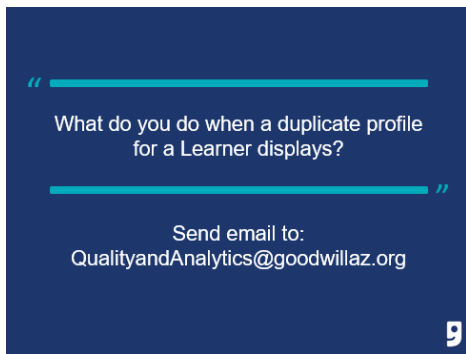
Notes:

Say: A couple of things to remember:

- If the Learner doesn't populate with the Genesis ID#, add the Learner's name
- If both the Learner's name and Genesis ID# doesn't populate, send an email to the referring party that sent the referral request

For the sake of this training, let's open a Learner's profile, click the jobseeker's name, a direct link to the profile.

Step Two: Genesis Review



Slide 9: Duplicate Profile Question

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: There are times in Genesis when a duplicate profile for a Learner displays.

If this occurs, send an email to the Quality and Analytics department to let them know about the duplicate profiles and include all the Genesis ID Numbers. The email address for the Quality and Analytics department is shown on screen.



Step Two: Genesis Review

Transition Slide

Genesis Review Process

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Slide 10: Transition Slide

Estimated duration: N/A

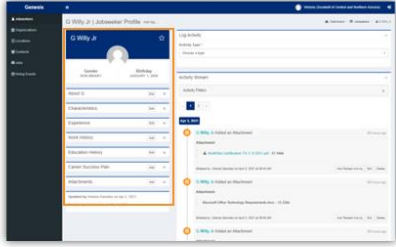
Participant Guide Page: N/A

Notes:



Step Two: Genesis Review

Learner Profile: Left Side



Slide 11: Learner's Profile – Left Side

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: Here is an example of a Learner's profile.

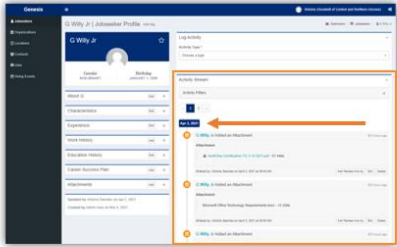
The left side of each Learner's profile includes:

- Name of Learner
- Placeholder or picture of Learner
- Gender
- Birthday
- About – (populated with Learner's name)
- Characteristics
- Experience
- Work History
- Education History
- Career Success Plans
- Attachments

Also, under this section are the **Updated by** and **Created by** dates. This shows when this profile was last updated and who last accessed it.

Step Two: Genesis Review

Learner Profile – Activity Stream



Slide 12: Learner's Profile – Activity Stream

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: The right side of the Learner's profile is the **Activity Stream**. Let's take a look at an example.

Each Activity Stream has the following:

- Date – When the activity happened
- Name and Type of Activity
- Notes – What was completed or done
- Entered by whom along with a date

There are many activities captured in this section including what the Learner has completed on www.mycareeradvisor.com and documentation any employee has included about working with the Learner.

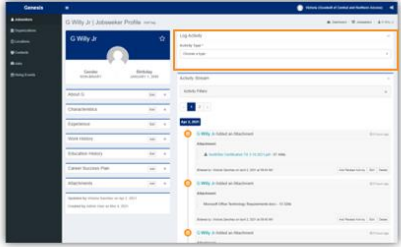
Do: Click to bring in animation.

To search for a specific activity, click the **Activity Filter** drop-down menu. Select the desired activity from the populated list.

Let's continue with the **Activity Stream** next.

Step Two: Genesis Review

Activity Stream – Log Activities



Slide 13: Activity Stream – Log Activities

Estimated duration: 1 minute

Participant Guide Page: N/A

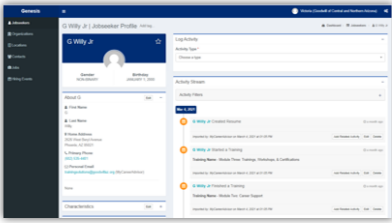
Notes:

Say: The last area under the Activity Stream to point out is the **Log Activities** box. Within this area is where an employee documents a completed activity. Examples of activities are Advanced Learning Enrollment or a follow up email to a Learner.

Next, let's dive deeper and explore the details under the left side of the Learner's profile.

Step Two: Genesis Review

About "Learner Name"



Slide 14: About "Learner Name"

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Let's open the **About** Learner's name section. To open any section on the left slide, click the plus icon next to Edit to expand and display the Learner's details.

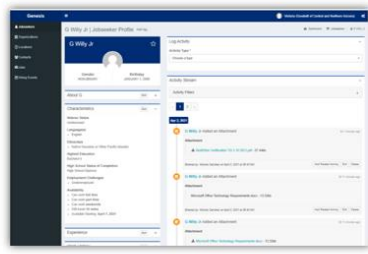
This section includes the following fields: First Name, Last Name, Home Address, Home Phone, and Personal Email.

A Learner can have more than one address, phone number, and email address. To close this section, click the minus icon.

Let's move on to the **Characteristics** section next.

Step Two: Genesis Review

Characteristics



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Slide 15: Characteristics

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: Let's open the **Characteristics** sections by clicking the plus icon next to Edit to expand and display the Learner's details.

Characteristics shows some very important information.

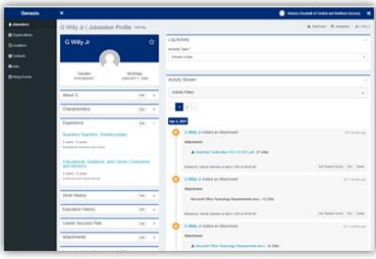
This section includes the following fields: Veteran Status, Language(s), Race(s), Highest Education, Employment Challenges, and Availability. Some of these areas such as Veteran Status, Highest Education, and Employment Challenges are optional and personal choices that the Learner is not required to complete.

To close this section, click the minus icon.

Let's move on to the **Experience** section next.

Step Two: Genesis Review

Experience



Slide 16: Experience

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Let's open the Experience sections by clicking the plus icon next to Edit and expand Learner's details.

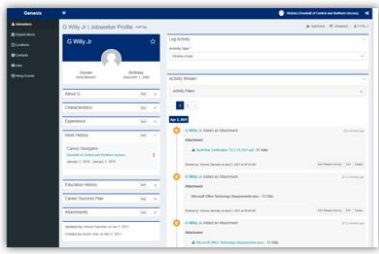
The **Experience** section shows the Learner's work history. Keep in mind, youth Learners may or may not have much work history. However, in lieu of work history, it is possible to add volunteer experience instead.

To close this section, click the minus icon.

Let's move on to the **Work History** section next.

Step Two: Genesis Review

Work History



Slide 17: Work History

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Let's open the Work History sections by clicking the plus icon next to Edit and expand Learner's details.

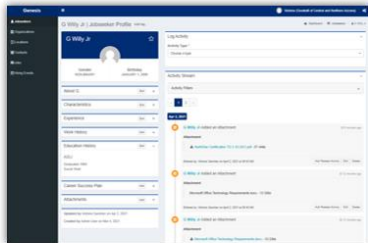
Unlike the **Experience** section, the work history here is more detailed, has timelines, and would be included on a resume.

To close this section, click the minus icon.

Let's move on to the **Education History** section next.

Step Two: Genesis Review

Education History



Slide 18: Education History

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Let's open the Education History sections by clicking the plus icon next to Edit and expand Learner's details.

Education History displays education information such as GED, high school diploma, certificates and higher education degrees.

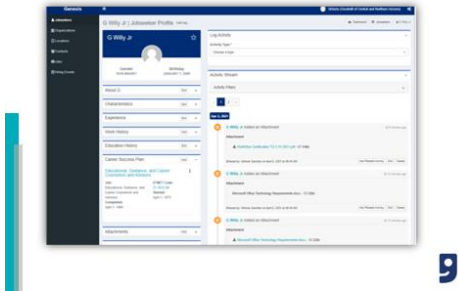
To close this section, click the minus icon.

Let's move on to the **Career Success Plan** next.



Step Two: Genesis Review

Career Success Plan



Slide 19: Career Success Plan

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: Let's open the Career Success Plan by clicking the plus icon next to Edit to expand and display the Learner's details.

The **Career Success Plan** is a very important section that **MUST** be filled out by a Career Navigator.

If a Learner wants to enroll in the Google IT Support Certification Advanced Learning Program, their Career Success Plan needs to include information technology (IT) information.

If a Learner wants to enroll in the Microsoft Office Specialist Program, their Career Success Plans needs to include career goals that would utilize Microsoft Office Suite applications.

If any of the information mentioned above is not in the Learner's profile, send an email to the referring party (i.e., Career Navigator) to request what is missing.

To close this section, click the minus icon.

Let's move on to the **Attachments** section next.





Step Two: Genesis Review

Paperwork to Review

Look for and review:

- Required enrollment documents
- Resume
- Signed Digital Literacy (Northstar) Certificate
- Microsoft Office Technology Requirements Form (only for Microsoft Office Specialist Program)





Slide 20: Paperwork to Review

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Let's open the Attachment sections by clicking the plus icon next to Edit and expand Learner's details.


The Advanced Learning Program requires specific paperwork.

The items to look for and review are:

- Required enrollment documents
- Resume
- **Signed** Digital Literacy (Northstar) Certificate
- Microsoft Office Technology Requirements Form (only for Microsoft Office Specialist Program)

Step Two: Genesis Review

Enrollment Documents



Intake Form, Employment and Training Readiness and Follow Up Agreement are mandatory

GII Photo Release Form and Release of Information Mission Services Form are optional

Slide 21: Enrollment Documents

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: Here is a quick snapshot of enrollment documents. It is recommended to upload each enrollment document page separately. Each document page must be filled out completely.

The **Intake Form: Employment and Training Readiness Form** (formerly known as Intake Form **Questionnaire**) and **Follow Up Agreement** form are both mandatory. The **GII Photo Release Form** is optional. If it is needed for a success story, Marketing will take care of this request.

The **Release of Information Mission Services Form** is also optional.

The required forms are subject to change. Remember to check the Knowledge Base (aka, the GCNA Library on the Goodwill Gazette).

Let's see what the resume looks like next.

Step Two: Genesis Review

Say: This resume shows details of the Learner’s work history.

At first glance of the **Attachments** section, we didn’t see the resume and it appeared to be missing. Sometimes within the enrollment paperwork you need to scroll all the way down to the bottom to find the resume. Other instances require a more detailed search.

Let’s move on and look at the Digital Literacy Certificate next.

Resume Example

Qualifications

- 7 years' experience in Maintenance and construction
- 2 years' experience in Millwright and repair work (U.S. Army)
- Proficient in Microsoft Office, Word, Excel, Access/Power and Outlook
- Excellent communication, customer service, sales and training skills.
- Ability to work comfortably in a team member, or assume a leadership role

Experience

Providence, Rhode Island August 2008 - February 2010

- Electrical wiring, installation or repairs, tested and set up specifications and load values.
- Use a variety of tools or equipment, such as power construction equipment, measuring devices, gauges, dies, and fitting equipment, such as drillholes, punches, or hand tools.
- Read blue prints, sketches, or drafts to install, maintain, or repair electrical wiring, equipment, or fixtures.
- Perform electrical troubleshooting tasks, such as diagnosing troubles to the control or wiring of lifting devices.

North Attleboro, Massachusetts, MA July 2005 - August 2008

- Installation, assembly, test, repair, and overhaul of printing units from linotypes, dummies, or galley machines.
- Check the forms they hold for accuracy to see that they are properly furnished.
- Install, test, and overhaul circuitry, using wire, sheet, hand or power tools, hand or power tools, and files.
- Operate power presses or stamping machines.

West Warwick, Rhode Island, RI November 2002

- Operate power presses with automatic printing and cutting facilities, and help them with any repairs.
- Assist in the maintenance of equipment, such as assembling or plating or roll and packages.
- Assist in the maintenance of the equipment and the plant or the maintenance equipment.
- Feed up or over equipment according to records, specifications, or sketches.
- Coordinate repairs and maintenance of machinery. (October 2002 - June 2002)
- Apply leading compounds to hand or walking pans to prevent against entry of water or oil.
- Smooth or clean freshly ground enamel or lacquer, apply flake, remove sludge or prevent sludge from forming.
- Mix, brush, or spray paint, staining solutions, or other compounds over surfaces to clean them or provide protection.
- Control traffic passing over, to, or around work areas.

Slide 22: Resume Example

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:



Step Two: Genesis Review

Digital Literacy Certificate Example



Slide 23: Digital Literacy Certificate Example

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: The digital literacy certificate example on screen is a Northstar Certificate. Most of the time this is the certificate that is provided. A Digital Literacy Certificate can be from almost anywhere but must meet the Northstar Literacy Competencies that are listed on the website.

The most **important** area to verify is the signature line. If there is no signature then the certificate is void.

This example has something missing. That's it, there is no signature, so therefore the certificate is not valid!

If the signature is missing, send an email to the Career Navigator that sent you the referral and request for this to be signed.

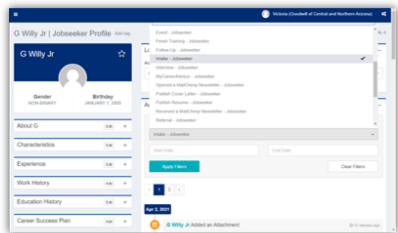
Now that everything has been reviewed in the **Attachments** section, click the minus icon to close.

Next, let's discuss how to find the Intake Case Note.



Step Two: Genesis Review

Locate Intake Case Note



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Slide 24: Locate Intake Case Note

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A

Notes:

Say: To locate the Intake Case Note:

1. Navigate to the **Activity Stream** box.
2. Click the **Activity Filter** drop-down menu and scroll through the list to find the activity called **Intake - Jobseeker**.
3. Highlight this option to select it.
4. A checkmark on the right side of the title appears to show it is selected.
5. Click the **Apply Filters** button.

The activity opens and displays the information below the Activity Stream. The body of the intake case note should state other important details about the Learner such as the who, why, where, what, and goals. Intake case notes are always completed by the referring party.

Now that we have completed the Genesis tour, let's talk about the Genesis Review timeline.

Step Two: Genesis Review

Timeline to Complete

The timeline to complete a Genesis Review is two *business days*

- Includes reviewing all sections and notes
- Ensuring all documents are signed, uploaded, and attached
- Send Referral Status Update to referring party

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Slide 25: About “Learner Name”

Estimated duration: 1 to 2 minutes

Participant Guide Page: N/A


Notes:

Say: The timeline to complete a Genesis review is two business days.

- This includes reviewing all sections and notes in the Learner’s profile.
- Ensuring all documents are signed, uploaded, and attached.
- And last but not least, sending a Referral Status Update email to the referring party with updates on the Learner’s enrollment status change(s).



Step Two: Genesis Review




Training Review

Today we covered:

Step One: Genesis Review Process

1. Open the Learner's profile.
2. Review the Learner's profile by opening all sections.
3. Check to ensure all required documents are uploaded.
4. Send an email to the referral party if anything is missing.
5. Send a referral status email to the referring party.



Slide 26: Training Review

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: The Genesis review process is now complete. Let's recap some key points.

1. Open the Learner's Genesis profile.
2. Review the Learner's profile by opening all sections.
3. Check to ensure all required attachments are uploaded.
4. Send an email to the referring party if there are any missing documents or information.
5. Send a Referral Status Update email to the referring party.

Let's discuss where you can find resources next.



Step Two: Genesis Review

Additional Resources

Step Two: Genesis Review	Master List of Case Note Templates and Emails
Advanced Learning Genesis Review Guide	Advanced Learning Case Note Documentation Templates Document

Always review the Knowledge Base within the GCNA Library for the most current updates.

If you need assistance, contact your manager or the Training Solutions Team at TrainingSolutions@goodwillaz.org.

Slide 27: Resources

Estimated duration: 2 minutes

Participant Guide Page: N/A

Notes:

Do: List/provide resources available for more information. (see below)

Say: There are resources available to help you with the Advanced Learning Program process.

For specific details on Step Two: Genesis Review, refer to the **Advanced Learning Genesis Review Guide**.

For a master list of case note templates and emails for the Advanced Learning Program, review the **Advanced Learning Case Note Documentation Templates Document**.

If you need assistance, please contact your Manager or the Training Solutions Team at TrainingSolutions@goodwillaz.org.

Do: Click to bring in animation

Say: Remember to always review the Knowledge Base within the GCNA Library for the most current updates.

Let's take a look at what is next in the Advanced Learning Program series.



Step Two: Genesis Review



Slide 28: Conclusion Slide

Estimated duration: 1 minute

Participant Guide Page: N/A

Notes:

Say: Thank you for attending today’s training. The next step in the Advanced Learning Program series is **Step Three: Evaluator Interview.**

