

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS _____

The Manage Customer function describes the process staff uses to Read, Update, or Add information for a customer. Workers will start with Manage Customer when initially meeting with a customer for the first time because it establishes the Customer Record as the base record for ASSET. Workers subsequently will use Manage Customer to retrieve the records of customers for whom new or updated information is received.

It is the goal to have only one Customer Record for an individual and that all workers, regardless of program affiliation, have the responsibility for keeping this record up-to-date. The customer record does not “belong” to any staff person or program; it simply establishes the person in ASSET.

Creating a Customer Record:

The Customer Record can be created in one of two ways:

- The customer “registering” via Job Center of Wisconsin (JCW) may have established the Customer Record. A case manager can conduct the Customer Search by selecting the Last Name, First Name, Date of Birth or PIN of the customer record for the individual to determine if the customer has a current active/inactive record present in ASSET.
- If a Customer Record does not exist for a person with whom the worker is working, the worker can create a Customer Record in ASSET by clicking on the Add Customer button on the Search Results screen. To avoid having multiple records in ASSET a worker should conduct one or more of the Customer Searches (see chapter 3-1).

Registering via JCW does not capture all of the data recorded on the Customer record and the customer-entered information is not verified. Workers should go to Manage Customer the first time a customer is seen and should complete all the other information fields or update any information that is not correct.

Note: At the same time the Customer Record is created, ASSET also creates a **Title 3 (Wagner Peyser) Program** registration with a registration date equal to the intake date shown on the Customer Record.

Using the Customer Record:

Once a customer is selected or the Add Customer button is clicked, ASSET displays the Customer Details page. Behind the scenes, the system adds a reference to the new Customer to the “Previously Searched for Customers” list for this worker. This customer appears at the top of the list wherever the worker navigates in ASSET, so if other functions need to be accessed for this same participant, the worker need only look at the Previously Searched for Customers list to launch the function.



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In the view of the Customer Details page, the Menu Tree remains open to the left and the data capture section is on the right. There will be a SAVE button at the top and bottom of every data capture section.

In an effort to minimize the amount of scrolling down a long page, the ASSET page design uses a tabular format to move from one group of data to another. The Customer Details page has up to five tabs across the top that lists the groupings of information about each customer:

- Contact Details
- Demographics
- Military Service
- Case Management Information
- Job Center of Wisconsin (appears only if customer has registered in JCW)

When the worker clicks on the various tabs, that section becomes “active” and the color changes from gray to beige. Data denoted by an asterisk (*) is mandatory to create a Customer Record. When going to Manage Customer for the first time for a new customer, workers should move through all the tabs sequentially and respond to all the data entries before pressing the SAVE button.

Here is an example of the Customer Details record, showing **Contact Details** as the active tab:

ASSET - Customer Details for Survey JCW 5947

Save
Event History

Contact Details | Demographics | Military Service | Case Management Info | Job Center of Wisconsin

Contact Information:

PIR#: 5947

* Intake Date: 04/02/2012 [mm/dd/yyyy]

Last Self Service Date: 04/02/2012

* Social Security Number: [mask] [mask-ss-aaaa] Create Pseudo SSN

Title: [dropdown]

* First Name: Survey

Middle Initial: [text]

* Last Name: JCW

Suffix: [dropdown]

* Gender: Female [dropdown]

* Date of Birth: 04/02/1975 [mm/dd/yyyy]

Add Alias/Maiden Name

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If the worker attempts to save a record without all required items completed, an error message appears in red text. The error message informs the worker what information is missing and on which tab that item is located. A red exclamation mark (!) marks the item on the page.

The screenshot shows the 'ASSET - Customer Details' form. The 'Contact Details' tab is active. A red error message states: 'Please correct the following:'. Below this, a list of errors is shown, each preceded by a red exclamation mark (!). The errors are: 'Contact Details Tab: Missing Intake Date', 'Contact Details Tab: Missing SSN', 'Contact Details Tab: Missing First Name', 'Contact Details Tab: Missing Last Name', 'Contact Details Tab: Missing Gender', 'Contact Details Tab: Missing Date of Birth', 'Contact Details Tab: Missing Residence Address Line 1', 'Contact Details Tab: Missing Residence City', 'Contact Details Tab: Missing Residence State', 'Contact Details Tab: Missing Residence Zip', 'Contact Details Tab: Missing Residence County', 'Demographics Tab: Race is required, please select at least one', 'Demographics Tab: Missing Limited English Language', 'Case Management Info Tab: Missing Current Education Status', 'Case Management Info Tab: Missing Highest School Grade Completed', 'Case Management Info Tab: Missing Current Employment Status', and 'Case Management Info Tab: Current Unemployment Compensation Programs (UI) is Required'. Below the error list, the 'Contact Information' section is visible, with fields for 'Intake Date' and 'Social Security Number' marked with red exclamation marks (!). The 'PIN Not Yet Assigned' section has a 'Set As Today' button, and the 'Last Self Service Date' section has a 'Create Pseudo SSN' button. The 'UI Token' field has a 'Use UI Default' button.

Note that the red exclamation marks (!) in the example above denote the Intake Date and Social Security Number on this tab are two items that are missing in error. As each item is addressed, the item on the list and the red exclamation mark next to the item disappear.

The By Block

Beneath the active part of the page is a section of the Customer Record that remains in gray and stays “active” regardless of the tab selected. This section, called the “By Block” provides information about the Staff Type (blank, DVOP or LVER), Office, and WDA of the worker completing the form. The system will keep track of the PIN of the original “creator” and the subsequent “updaters”. The By Block includes other data fields, depending on the Manage function open.

Over time, this “By Block” information may change to reflect a new Office and WDA with whom the customer is associated. Initially, this information is pre-filled by JCW based on the customer’s place of registration. If a conversion is created, the Created By information will have CONVERT auto populated by the system.



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There is only one By Block for the entire Customer Record, regardless of the tab currently opened. Changing the information while on one tab will change it for all tabs within the Customer Record. Note, too, that the By Block is also the location where users can click on a button to create a printable version of the entire (all tabs) Customer Record.

Here's an example of the Customer Record By Block:

Make all information about this customer confidential.

Staff Type:

* Office Code:

WDA:

Created: 4/2/2012 12:56:50 PM By: INTERNET/JCW
Last Updated: 4/2/2012 12:58:34 PM By: INTERNET/JCW

Contact Details Tab

The first tab contains base data about the customer. It is not possible to show the full length of the entire page on one screen – the user will need to scroll using the scroll bar at the right of the screen to see all the items.

ASSET - Customer Details for Lee Doerr (7209)

Contact Details | Demographics | Military Service | Case Management Info

Contact Information:

FIN: 7209

Intake Date: 03/16/2011 [mm/dd/yyyy]

Last Self Service Date: **Has not used Self Service**

Social Security Number: 398-58-6649 [###-##-####]

A red arrow points to the vertical scroll bar on the right side of the form.



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The entire page looks like this:

ASSET - Customer Details for MICHAEL JOHNSON (2180)

Save
Event History

Contact Details | Demographics | Military Service | Case Management Info

Contact Information:

PIN: 2180

Intake Date: 07/25/2004 (mm/dd/yyyy)

Last Self Service Date: Has not used Self Service

Social Security Number: [Redacted] [Create Pseudo SSN]

Title: [Dropdown]

First Name: MICHAEL

Middle Initial: [Dropdown]

Last Name: JOHNSON

Suffix: [Dropdown]

Gender: Male [Dropdown]

Date of Birth: 09/22/1955 (mm/dd/yyyy)

Add Alias/Maiden Name

Residence Address Line 1: 3652 S 38TH ST

Residence Address Line 2: [Empty]

Residence City: MILWAUKEE

Residence State: WI [Dropdown]

Residence Zip: 53221 - 1026 [Redacted]

County: Milwaukee [Dropdown]

Mailing Address Line 1: [Empty]

Mailing Address Line 2: [Empty]

Mailing City: [Empty]

Mailing State: [Dropdown]

Mailing Zip: [Empty] - [Empty] [Redacted]

Telephone: (414) 384-4222 [Redacted] Extension: [Empty]

Message Phone: [Empty] [Redacted] Extension: [Empty]

Cellular Phone: [Empty] [Redacted]

E-Mail: [Empty] [p@b.com]

Make all information about this customer confidential.



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The Field Definitions are:

| FIELD | REQUIRED | DEFINITION |
|-------------------------------|----------|--|
| PIN | NA | Personal Identification Number – A Customer ID assigned automatically by ASSET and displayed in this field. |
| Intake Date | Yes | The date of Customer Record activation in ASSET. It is the date the person “registers” in JCW or the worker creates a new customer record. |
| Last Self Service Date | NA | The date the person last signed into JCW. The date is populated automatically by the system. |
| Social Security Number | Yes | The person’s Social Security Number in the format required. xxx-xx-xxx. The first 3 digits of the SSN may not be 000, 588, 666, or greater than 899. The middle 2 digits may not be 00, and the last 4 digits may not be 0000. |
| Create Pseudo SSN | No | Click on the Create Pseudo SSN button to add the pseudo number only if a customer does not have a SSN or if a customer refuses to provide their number. The pseudo number for all individuals will be: 000-00-0000. |
| Title | No | This is the title some customers may wish to use. It may be left blank. |
| First Name | Yes | The customer’s given name. Do not use a shortened version or nickname. The name must be exactly as it appears on the customer Social Security Card. |
| Middle Initial | No | Middle Initial, if appropriate. |
| Last Name | Yes | The customer’s surname. |
| Suffix | No | The name suffix that some individuals prefer using. |
| Gender | Yes | The gender of a customer, male, female, or unknown/undisclosed. |



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| FIELD | REQUIRED | DEFINITION |
|----------------------------------|----------|--|
| Date of Birth | Yes | The date when the customer was born in two-digit month, two-digit day, four-digit year format. |
| Add Alias or Maiden Name | No | This section on the Customer Details page is to be used when updating Customer information. The fields available for update include: Alias Type, Alias First Name, Alias Middle Initial, Alias Last Name, and Alias Suffix. |
| Remove Alias/ Maiden Name | No | Click on the "Remove Alias" button if the information on the Customer Details page is found to be incorrect. |
| Residence Address Line 1 | Yes | The street or Post Office box address, that is the mailing address, where the customer lives, including Apartment, Lot Number, Suite or other suffix. This address should include appropriate spaces and capitalization so the Post Office can easily use the information to deliver mail. |
| Residence Address Line 2 | No | This address line is provided for other special addressing information such as the name of the building or C/O (In care of) information. |
| Residence City | Yes | The city in which the customer resides. |
| Residence State | Yes | The state in which the customer resides. |
| Residence Zip Code | Yes | The 5 or 9-digit zip code of the residence. |
| County | Yes | The county of residence. If the response is Unknown, workers need to determine the correct county from the dropdown. |
| Mailing Address Line 1 | No | The mailing address of the customer, if different from the residence address. |
| Mailing Address Line 2 | No | This address line is provided for other special addressing information such as the name of the building or C/O (In care of) information for the mailing address. |



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| FIELD | REQUIRED | DEFINITION |
|---|----------|---|
| Mailing City | No | The city in which the mailing address exists. |
| Mailing State | No | The state for the mailing address. |
| Mailing Zip | No | The mailing address zip code. |
| Telephone and Extension | No | The telephone number and extension of a customer. |
| Message Phone and Extension | No | The message telephone number and extension of a customer. |
| Cellular Phone | No | The telephone number of a customer cell phone. |
| E-mail | No | The electronic mailing address of customer. |
| Make all information about this customer confidential | No | Check this box if the entire record for this person is to be accessible by the worker and his/her supervisor only. Check this box only if there is a legal, personal safety, or other circumstance that indicates the record should be kept confidential. The reason must be documented in a Customer Note. |

Demographics Tab

This is the display of the information collected on the Demographics tab. Most of the items collected on this page are required for federal reporting and a few fields were added to help workers better identify customers who may have limited English proficiencies.



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ASSET - Customer Details for Leo Duenr (7209)

Save Delete Event History

Contact Details **Demographics** Military Service Case Management Info

Demographics:

Ethnicity Hispanic or Latino: Yes No Unknown/undisclosed

• Race - Check at least one:

- American Indian or Alaskan Native
- Asian
- Black or African American
- Hawaiian Native or other Pacific Islander
- White
- Other
- Unknown/undisclosed

• Limited English language proficiency: Yes No No Response

Limited English Reading Ability: Yes No No Response

Limited English Speaking Ability: Yes No No Response

Primary Language:

• Individual with a disability:

• Category of disability:

Migrant Seasonal Farm Worker:

Make all information about this customer confidential



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The Field Definitions are:

| FIELD | REQUIRED | DESCRIPTION |
|---|----------|---|
| Ethnicity Hispanic or Latino | No | Either Yes, No, or Unknown/Undisclosed. |
| Race | Yes | <p>At least one race must be marked and more than one can be marked if the customer is of a combination thereof.</p> <ul style="list-style-type: none"> • American Indian or Alaskan • Asian • Black or African American • Hawaiian Native or other Pacific Islander • White • Other • Unknown/undisclosed if customer refuses to answer the race question, or does not know his/her race. |
| Limited English language proficiency | Yes | Required to select a response of Yes or No, to indicate if the customer has limited English language skills. |
| Limited English Reading Ability | No | Dynamically appears only when Limited English Language Proficiency response is "Yes." Respond "Yes" or "No" if the customer has limited English reading ability based on the question "Do you have limited English reading ability skills?", or if there is no response to the question. |



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| FIELD | REQUIRED | DESCRIPTION |
|---|----------|---|
| Limited English Speaking Ability | No | Dynamically appears only when Limited English Language Proficiency response is "Yes." Respond "Yes" or "No" if the customer has limited English speaking skills based on the question "Do you have limited English speaking ability skills?" or if there is no response to the question. |
| Primary Language | No | The language that identifies the primary or first language of the customer who has indicated that s/he has limited English proficiency skills. |
| Individual with a disability | Yes | If the customer has a disability, this identifies the degree of disability. The choices include: "Yes," "No," or "Unknown/Undisclosed" for individuals who do not wish to disclose their disability status. |
| Category of disability | Yes | Dynamically appears only when Individual with a Disability response is "Yes." One of responses must be selected. <ul style="list-style-type: none"> • Physical Impairment • Mental Impairment • Both Physical and Mental Impairments • Participant did not disclose |



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| FIELD | REQUIRED | DESCRIPTION |
|-------------------------------------|----------|--|
| Migrant Seasonal Farm Worker | No | <p>Identifies the status of the customer as a migrant seasonal farm worker. Selections are:</p> <ul style="list-style-type: none"> • Migrant Farm Worker - A seasonal farm worker who had to travel to do the farm work so that he/she was unable to return to his/her permanent residence within the same day. Full-time students traveling in organized groups rather than with their families are excluded. • Seasonal Farm Worker - A person who during the preceding 12 months worked at least an aggregate of 25 or more days or parts of days in which some work was performed in farm work, earned at least half of his/her earned income from farm work, and was not employed in farm work year round by the same employer. For the purposes of this definition only, a farm labor contractor is not considered an employer. Non-migrant individuals who are full-time students are excluded. • Migrant Food Processing Worker – A person who during the preceding 12 months has worked at least an aggregate of 25 or more days or parts of days in which some work was performed in food processing, who earned at least half of his/her earned income from processing work, and was not employed year round by the same employer. Migrant food processing workers who are full-time students but who travel in organized groups rather than with their families are excluded. |

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Military Service Tab

If a customer is a U.S. military veteran or is an individual who qualify for veterans services, information must be captured on this part of the Customer Record for federal reporting purposes.

This is a display of the active Military Service page:

The screenshot displays the ASSET system interface for a customer named Lee Duerr [7209]. The interface is divided into a left-hand navigation menu and a main content area. The navigation menu includes options such as Case Management, Manage Customer, Manage Employment, Manage Assessments, Manage Employability Plan, Manage Programs, Manage Services, Manage Exits, Manage Follow-ups, Manage Customer Notes, Manage Alerts, Staff Requests, Job Matching, System Reports, HELP (ASSET System Manual), Staff Information, Staff Search, WI Job Center Directory, and Exit ASSET. The main content area is titled "ASSET - Customer Details for Lee Duerr [7209]" and features a "Save" button, a "Delete" button, and an "Event History" button. Below these buttons are four tabs: "Contact Details", "Demographics", "Military Service", and "Case Management Info". The "Military Service" tab is currently selected, showing the following information:

- Military Service Information:**
 - Military Services: Yes No
 - Transitional Service Member: Yes No
 - Veteran status: Yes, Eligible Veteran
 - Active Duty Begin Date: [mm/dd/yyyy]
 - Active Duty End Date: [mm/dd/yyyy]
 - Campaign Veteran: Yes No
 - Disabled Veteran: Yes Yes, Special Disabled No

At the bottom of the form, there is a checkbox labeled "Make all information about this customer confidential," which is checked.



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The Field Definitions are:

| FIELD | REQUIRED | DEFINIITON |
|------------------------------------|----------|--|
| Military Service | Yes | A "Yes" or "No" value based on whether the customer served in the U.S. military. |
| Transitional Service Member | No | A "Yes" or "No" value if the individual is a service member in active duty status (including separation leave) who participates in employment services and is within 24 months of retirement or 12 months of separation. |
| Veteran Status | Yes | <p>Select a value from the dropdown menu based on whether or not the customer is a veteran, or if the customer is an Other Eligible Veteran based on the following definitions:</p> <p><u>Veteran</u>: an individual who served in the active military, naval or air service, and who was discharged or released from such service under conditions other than dishonorable, which may include the National Guard or Reserve personnel.</p> <p><u>Other Eligible</u>: the spouse of any of the following</p> <ul style="list-style-type: none"> - A veteran who dies of a service-related disability - Any veteran who has a total disability resulting from service - Any veteran who died during a time when a disability so evaluated was in existence. - A veteran who is currently, or has been for more than 90 days, missing in action, captured in the line of duty by hostile force, and/or forcibly detained or interred in the line of duty by a foreign government or power. |
| Active Duty Begin Date | Yes | Dynamically appears only when a Veteran Status of "Yes <= 180 days" or "Yes, Eligible Veteran" is selected. Enter the date the customer began active duty in the armed forces. Note: if the exact day is unknown, enter 01. Example: if the entry was in May, 1965, enter 05/01/1965. |



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| FIELD | REQUIRED | DEFINIITON |
|-----------------------------|----------|---|
| Active Duty End Date | Yes | Dynamically appears only when a Veteran Status of "Yes <= 180 days" or "Yes, Eligible Veteran" is selected. Enter the date the customer ended active duty in the armed forces. Note: if the exact day is unknown, enter 01. Example: if the date was in May, 1967, enter 05/01/1967. |
| Campaign Veteran | No | Select "Yes" or "No" to indicate whether or not the applicant is a veteran who served on active duty in the U. S. armed forces during a war or in a campaign or expedition for which a campaign badge or expeditionary medal has been authorized as identified by the Office of Personnel Management (OPM). Updated information on campaigns and dates included may be obtained on the OPM web site: http://www.opm.gov/ |
| Disabled Veteran | No | Select "Yes" if the applicant is a Veteran who is entitled to compensation regardless of rating (including those rated at 0%) or who, but for the receipt of military retirement pay, would be entitled to compensation, under laws administered by the Department of Veterans Affairs, or was discharged or released from active duty because of a service-related disability. Select "Yes, Special Disabled" if the Veteran is entitled to compensation under the laws administered by the DVA for disability. If not, select "No." |

Newly Separated Veteran: for Title 3 is defined as a Title 38 eligible veteran whose date of separation from active U.S. military service is within the 36 months prior to the beginning of the registration year. DET federal report programming will calculate this field for federal reports based on ASSET registration year data and the Active Duty End Date.

Recently Separated Veteran: The WIA Title IB program definition is that the individual is a veteran who applied for participation under WIA Title I within 48 months after discharge or release from active U.S. military, navel, or air service.



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Case Management Info Tab

This tab contains case management information such as educational information, parenting status, current employment status, and driver's license details.

ASSET - Customer Details for Lee Dowett (7209)

Save Delete

Event History

Contact Details Demographics Military Service **Case Management Info**

Case Management Information:

- Current Education Status: Attending High School or Less
- Current Highest school grade completed: Third Grade Completed
- Single Parent: Yes No
- Non-Custodial Parent: Yes No
- Current Employment Status: Not Employed
- Current Unemployment Insurance Programs (UI): Eligible claimant referred by WPRS

O'NET Codes:

| Action | O'NET Code | Interest | Training | Experience | Self Reported |
|--------|------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Remove | 15-1121.00 | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Job Title: _____

Occupational Category: _____

O'NET: _____ [Add O'NET](#) [Link to O'NET](#)

Driver's License:

- Class A - Commercial Motor Vehicle
- Class B - Commercial Motor Vehicle
- Class C - Commercial Motor Vehicle
- Class D - Regular (Auto, Light Truck, Moped)
- Class M - Motorcycle

Endorsements:

- F - Farm Service (Restricted)
- H - Hazardous Materials
- N - Tank Vehicles
- P - Passenger Vehicle
- S - School Bus
- T - Double/Triple Trailers

Non-Wisconsin License: Yes No

Vehicle for Work: Yes No

Make all information about this customer confidential.

Confidential Manager: Thompson, Andrea [Change Staff](#)

Staff Type: _____

Office Code: 0000-Central Office - GEF 1 Jobnet Machines

WDA: 000-Central Office - GEF 1

Created: 3/16/2011 11:07:42 AM By: DWD:THOMPAN

Last Updated: 3/9/2012 11:40:36 AM By: JJ3358 - Onet Update

Save Delete

Event History

Printable Version (all tabs)



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The Field Definitions are:

| FIELD | REQUIRED | DEFINITION |
|---|----------|--|
| Current Education Status | Yes | <p>This field indicates the customer Education Status at intake. Choices are:</p> <ul style="list-style-type: none">• Attending High School or Less• Attending Alternative School• Attending Post High School• Not Attending, Drop Out• Not Attending, High School Graduate |
| Current Highest school grade completed | Yes | <p>Identifies the highest grade in school completed as of the current date. If grades 0 through 11 are identified, the Current Education Status field must be either Student, Attending High School or Less, or Not Attending High School Dropout. The remaining options may be selected only if the Current Education Status is either of the Not Attending options.</p> <p>NOTE: A person who finishes 12th grade but does not receive a HS diploma or equivalent is considered to have completed only 11th grade.</p> |
| Single Parent | No | Identifies whether or not the customer is a single parent. |
| Non Custodial Parent | No | The parent does not have custody of any of his/her children. |



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|---|----------|---|
| Current Employment Status | Yes | <p>The individual's employment status at intake. One of the responses must be selected.</p> <ul style="list-style-type: none"> • Employed • Not Employed • Employed but received "Notice of Termination of Employment" • Employed but received "Notice of Military Separation" |
| Current Unemployment Insurance Programs (U.I.) | Yes | <p>Shows the customer's Unemployment Insurance (UI) status as entered in JCW.</p> <ul style="list-style-type: none"> • Eligible claimant referred by WPRS (receiving UI benefits and received a letter from UI instructing to attend a re-employment services orientation) • Eligible claimant not referred by WPRS (receiving UI benefits but did not receive a letter as noted above) • Exhaustee (Customer has exhausted UI benefits) • Neither claimant nor exhaustee (not receiving UI benefits) |
| O*NET Codes | No | <p>Displays information that representing the customer's area of interest, training, experience or was self-reported on JCW. Note that the information in the O'NET area can be removed if necessary.</p> |



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|------------------------------|----------|--|
| Job Title | No | Used as part of search criteria to help users populate O*NET Codes table above. The user enters a job title held by the customer in this field, which then determines the options for selection in the following dropdown field, Occupational Category. For example, entering "programmer" in this field will populate the Occupational Category dropdown field with related occupations such as Computer Programmers, Numerical Tool and Process Control Programmers, Computer Software Engineers, Systems Software, etc... |
| Occupational Category | No | Used as part of search criteria to help users populate O*NET Codes table above. This dropdown field will display a list of occupational categories that relate to the Job Title the user enters in the Job Title field above. When the user selects an occupational category from the list, this will automatically populate the following field, O*NET, with the numerical O*NET code associated with the selected occupational category. |
| O*NET | No | Used to populate the O*NET Codes table above with O*NET codes. The user can enter the O*NET code directly into this field or, if the user has entered a job title and occupational category in the fields directly above, the applicable O*NET code will automatically populate this field. Note: an entry in this field is required to populate the O*NET Codes table above. |
| Add O*NET | No | Button which, when clicked, will populate the O*NET Codes table above with the O*NET code entered in the O*NET field. |
| Link to O*NET | No | Link to the O*NET Online website, where users can conduct a thorough search to find the appropriate O*NET code for a given customer. |



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| FIELD | REQUIRED | DEFINITION |
|------------------|----------|--|
| Driver's License | No | <p>Check all appropriate boxes indicating the class of driver's license(s) held by the customer.</p> <ul style="list-style-type: none"> ▪ Class A: For operation of a commercial motor vehicle: Any combination of vehicles with a Gross Vehicle Weight Rating (GVWR), actual weight, or registered weight over 26,000 pounds provided the GVWR, actual weight, or registered weight of the towed vehicle(s) is more than 10,000 pounds. ▪ Class B: For operation of a commercial motor vehicle: Any single vehicle with a GVWR, actual weight, or registered weight over 26,000 pounds, or such vehicle towing a vehicle with a GVWR, actual weight, or registered weight of 10,000 pounds or less. ▪ Class C: For operation of a commercial motor vehicle: Any single vehicle with a GVWR, actual weight, or registered weight of 26,000 pounds or less, (or such vehicle towing a vehicle less than 10,000 pounds) transporting hazardous materials requiring placarding or designed to carry 16 or more persons including the driver. ▪ Class D: For operation of automobiles, light trucks and mopeds. ▪ Class M: For operation of motorcycles. |



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| FIELD | REQUIRED | DEFINITION |
|------------------------------|----------|---|
| Endorsements | No | <p>Check all the appropriate boxes indicating the types of driver's license endorsements. You may choose more than one classification. For operation of a commercial motor vehicle, Classes A, B or C, a driver may also obtain one or more endorsements. The Class D license can also have a school bus endorsement if the vehicle is designed to carry less than 16 persons including the driver. Each endorsement requires a special knowledge test. The school bus "S" endorsement and the hazardous materials "H" endorsement require a knowledge test when originally issued and on renewal. The school bus "S" endorsement also requires a skills test when originally issued and on renewal. The passenger "P" endorsement requires a skills test when originally issued. Wisconsin endorsements are:</p> <ul style="list-style-type: none"> F = Farm service H = Hazardous materials N = Tank vehicles P = Passenger vehicle S = School bus T = Double/triple trailers |
| Non Wisconsin License | No | Indicates if the customer's driver's license is from out-of-state. "Yes" means Not a Wisconsin Driver's License |
| Vehicle for Work | No | Indicates whether or not the customer has a vehicle available for transportation to the job site. |



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ASSET CASE MANAGEMENT FUNCTION

3-2 MANAGE CUSTOMERS

Job Center of Wisconsin Tab

The Manage Customer screen will include an additional "Job Center of Wisconsin" tab for those customers who have associated the username they use for their Job Center of Wisconsin (JCW) account with their Social Security Number attached to their customer record in ASSET. This display-only tab will show:

- the customer's User Name, date the customer first logged into JCW,
- the date the customer last accessed JCW,
- the number of resumes/work applications stored in JCW for that customer,
- the number of candidate profiles stored in JCW for that customer,
- a link to a copy of the customer's self-assessment survey, and
- the UI registration summary.

UI Registration Summary Information was added to assist Unemployment Insurance (UI) staff in enforcement of the UI mandate that customers register with JCW and complete a resume in JCW.

The Current Registration Status (WI) field provides information on the whether or not a customer has registered with JCW and if the customer completed a resume in JCW. The field can contain the following:

- Does NOT meet criteria for Wisconsin UI Benefits, customer is NOT registered [code: C]
- Does NOT meet all criteria for Wisconsin UI Benefits, customer is registered in a WIA Title 3 program/episode, but a finished resume is not present [code: T]
- Meets all criteria for Wisconsin UI Benefits [code: U]
- Pseudo SSN [code: 0]

The Current Registration Date (OOS) field provides information for staff who receive information requests from out of state Unemployment Insurance staff as to the date the customer registered with JCW.



Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-2 MANAGE CUSTOMERS

Below is an example of the Job Center of Wisconsin tab in ASSET:

The screenshot displays the ASSET system interface for 'Customer Details for Lee Doerr (7209)'. The left-hand navigation menu includes options such as 'Case Management', 'Manage Customer', 'Manage Employment', 'Manage Assessments', 'Manage Employability Plan', 'Manage Programs', 'Manage Services', 'Manage Exits', 'Manage Followups', 'Manage Customer Notes', 'Staff Requests', 'Job Matching', 'System Reports', 'HELP (ASSET System Manual)', 'Staff Information', 'Staff Search', 'WI Job Center Directory', 'Exit ASSET', and 'Posting Tools'. The main content area is titled 'ASSET - Customer Details for Lee Doerr (7209)' and features a 'Save' button and an 'Event History' button. Below these are tabs for 'Contact Details', 'Demographics', 'Military Service', 'Case Management Info', and 'Job Center of Wisconsin'. The 'Job Center of Wisconsin' tab is active, showing the following information:

| Job Center of Wisconsin Access: | |
|--|--------------------------------|
| User Name: | LeeDoerr |
| First Login: | 8/10/2012 10:38:42 AM |
| Last Accessed: | 8/10/2012 10:38:42 AM |
| Total Resumes / Work Applications: | 1 |
| Completed Resumes / Work Applications: | 1 |
| Candidate Profiles: | 1 |
| Self-Assessment Survey: | Survey Results |

Below this is a 'UI Registration Summary' section:

| UI Registration Summary: | |
|-----------------------------------|--|
| Current Registration Status (WI): | Meets all criteria for Wisconsin UI Benefits [code: U] |
| Current Registration Date (DOS): | 08/10/2012 |

An automatic Exit is created for the Wagner Peyser, Title 3 episode if a registrant has not used JCW or hasn't had any reported service from any program for more than 90 days. Once this exit is created, a record is no longer open in ASSET but is still known to ASSET (customer will have an ended episode).

The Manage Customer base record will remain in ASSET along with all the history of what has been recorded for that individual. If a customer uses JCW, ASSET will automatically create a new Title 3 Wagner-Peyser registration in Manage Programs with a registration date of that day. This new episode of Wagner Peyser participation establishes the person as a "new registrant" for Federal Reporting purposes (the Manage Customer Intake Date will remain as the first time this customer was known to ASSET).

A Title 3 worker may create a new Title 3 episode manually by going to Manage Programs and clicking on the Add Program/Program area button and completing the Title 3 Registration with the current program begin date (the date this new episode begins).

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