



# Users' Guide

## ASSET SYSTEMS REPORT

### 5-11 \_\_\_\_\_ CASE LOAD REPORT \_\_\_\_\_

The **Case Load Report** was developed as a Case Management tool for ASSET users. To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on Case Load and the page will look like this.

PIN	Name	Program/Program Area	Reg or Begin Date
<a href="#">4072</a>	BOPEEP, LITTLE	WIA Title 1 Adult	03/13/2006
<a href="#">3007</a>	DUCK, DAFHEY	WIA Title 1 Adult	04/20/2005
<a href="#">2966</a>	EDISON, THOMAS	WIA Title 1 Adult	04/13/2005
<a href="#">1499</a>	FROGGE, KERMIT	WIA Title 1 Adult	12/04/2006
<a href="#">520</a>	SIMPSON, MARGE	WIA Title 1 Adult	02/03/2005
<a href="#">2738</a>	SPONGE, BOB	WIA Title 1 Adult	02/28/2005

The case load report defaults to the Case Manager logged into ASSET. To obtain a report for another case manager select the name from the drop down Case Manager field. Next, select the Program/Program Area to see the number of individuals on the Case Load.

The Search Results provides information about the participants by the Program/Program Area selected by the case manager. Included on the report are; PIN, Name (customer name), Program/Program Area, and the Registration or Begin Date.

The Field Descriptions are:

FIELD	REQUIRED	DESCRIPTION
• <b>Case Manager</b>	N/A	The name of the Case Manager for this report.
• <b>Program/Program Area</b>	N/A	The Program Area from which the individual is receiving services.



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By clicking on the PIN (underlined and highlighted in blue), the page returned is the Service Summary Page. It will look like this:

**ASSET - Service Summary for Little BoPeep (4072)**

**Program Information - WIA Title 1** Registration Date: 03/13/2006

Program Area	Begin Date	End Date	Staff ID
Adult	03/13/2006		DWD\BARTED

<u>Service Name</u>	<u>Area</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Office</u>	<u>Staff ID</u>
<u>Assisted Job Search &amp; Placement</u>	AD	06/30/2006	11/06/2007	0810	DWD\BARTED
<u>Assisted Job Search &amp; Placement</u>	AD	03/13/2006	11/06/2007	0810	DWD\BARTED
<u>Career Guidance</u>	AD	03/13/2006	03/13/2006	0810	DWD\BARTED

Add Service

**Program Information - WIA Title 3** Registration Date: 03/13/2006 Staff ID:

<u>Service Name</u>	<u>Open Date</u>	<u>Close Date</u>	<u>Office</u>	<u>Staff ID</u>
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Add Service

Click on the Service Name highlighted and underlined in blue. This action will take you to the Service Summary page where a case manager can either update/change the service.



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### CASE LOAD REPORT

ASSET - Assisted Job Search & Placement Detail for Little BoPeep (4072)

Save  
Event History

**Program Name:** WIA Title 1  
**Program Area:** Adult

**Service Information**  
**Service Name:** Assisted Job Search & Placement  
**Service Category:** Core Services Staff Assisted

\* **Open: (One of the following is required)**

Planned Service Date: 06/30/2006 [mm/dd/yyyy] Set As Today  
Actual Service Date: 06/30/2006 [mm/dd/yyyy] Set As Today

\* **Close: (One of the following is required)**

Planned Service Date: 06/30/2007 [mm/dd/yyyy] Set As Today  
Actual Service Date: 11/06/2007 [mm/dd/yyyy] Set As Today

\* **Funding Source:** WIA Title 1B Adult

\* **Contract ID:** 10-0001 Select Contract ID

Old Contract ID:  
Provider Name:  
Provider Text:  
Failed to Attend WPRS Orientation Date: [mm/dd/yyyy] Set As Today  
Weekly Participation Hours:  
Location of Service Provision:

Trusted sites

Once a participant has been system exited the individual will drop off the Case Load listing.

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