Users' Guide

ASSET CASE MANAGEMENT

3-1____STRUCTURE OF SYSTEM FUNCTIONS____

Structure of System Functions

The functions that make up ASSET Case Management include all of the customer-related documentation components that workers have had available to them in the past. The primary difference in this Oracle-based system is the organization of the data and navigation to the appropriate spot. Once ASSET users become familiar with the structure of the system, moving from one function to another or to more detailed levels within a function is easy. To make learning the system faster, the design of the screens and the navigation from one screen to another was made as consistent as possible.

- **All Case Management functions are titled "Manage".** They are somewhat ordered in the same way as a customer might move through our programs. The Manage Customer function is where most activity will start. This is the "base record" for the individual in ASSET and is the place where information common to all programs is created and updated. The Manage Employment, Manage Assessments and Manage Employability Plans relate to the customer, without regard to active program affiliation. Manage Programs is where specific Program Registrations are done, as well as Program Area, for a WIA Title 1B and TAA participants. Manage Services is part of the on-going activity once a person is receiving staff services. The next two functions, Manage Program Exits and Manage Follow-ups, are some of the last actions taken on a customer's record. The last function, Manage Customer Notes, is not in the program progression sequence, but was placed last on the list for quick identification.

- **All Case Management functions start with "Customer Search".** The first level within any function is a Customer Search capability that allows the user to check the database to see if the customer is in the system or is not known to ASSET. In addition, ASSET remembers what the last search criterion was. For example, if the last search was by PIN, then the next time a search is done, PIN will still be the search criteria. This process is helpful to a worker who is doing a series of entries.

  See "Customer Search Process" on the next page.

- **All Customer Search Screens have a most recently served customer list.** When the worker opens any Manage function, the Customer Search screen appears. At the bottom of the screen is a list of the last 10 customers this user has accessed most recently. The list of Previously Searched for Customers moves from function to function. This means that a person whose record was just created in Manage Customer will be on the recently accessed list in Manage Case Notes. Using this list, the worker can access the new function screens for this customer without doing another search for the person. All the worker needs to do is CLICK on the PIN of the customer selected, and the next level of screens will open for that person.

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- **All Case Management screens with fields for entering data have a user template (called the By Block)**. If a page in any of the Case Management functions has fields for input or update of data, that page will include fields to capture information about the worker who created the information the first time and the worker who last updated the page. The office number and WDA are captured, based on the User default for the person who is logged onto ASSET. Some By Blocks also include a field for the identification of the customer's Case Manager, when a specific worker is associated with that customer for a particular Program or Program Area.

  The example below is a By Block that is most frequently seen in ASSET and contains all of the fields described above.

  Example: BY BLOCK

Customer Search Process

The process begins by clicking on any "Manage" function in the Menu Tree. This opens the Customer Search screen as shown on the next page. Workers must become familiar with the search process so that they can specifically identify their own customers or determine that the customer being served is not yet in the ASSET database.

This critical step cannot be over-emphasized because integrity of the data about this customer relies on the existence of a single record for this person.

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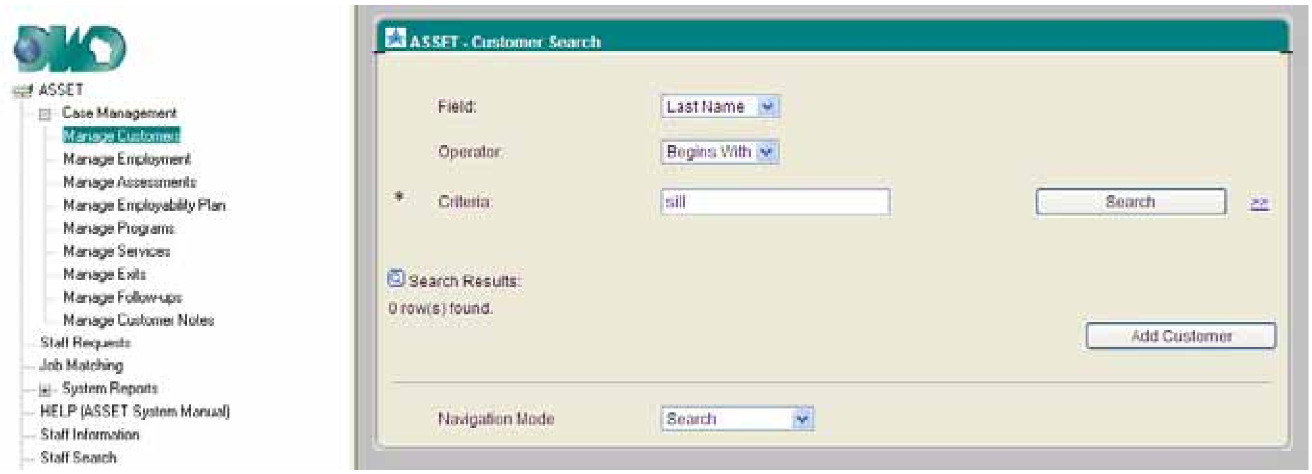
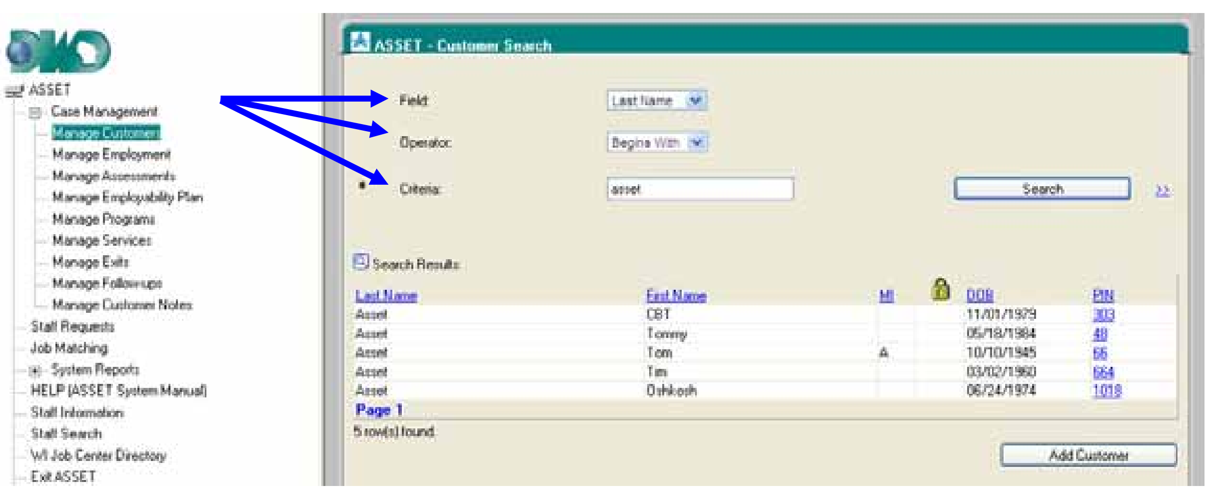


1. **The Simple Customer Search**

   A. Do a quick check to the Previously Search For Customers list (10 names) to see if this is a person with whom you recently worked. If the person is on the list, click on the underlined link for that person – generally it's a PIN or other key.

   B. Decide on Search Criteria if a Search needs to be done. In most cases, workers have either the person's name or date of birth to use. A simple search may be done using the information available. The Field tells ASSET what to search on, the Operator tells ASSET how to do the search, and the Criteria tells ASSET the personal information on which to search.



The following are the available options in the Field and Operator items.

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FIELD:

FIELD:	DEFINITION:	NOTES:
• **Last Name**	Last name of the customer.	Enter all or part of the name. The whole name must be entered if using the Exact Match Operator.
• **PIN**	System assigned number	
• **Date of Birth**	Date of Birth of the customer	In two-digit month, two-digit day, four-digit year format.
• **First Name**	First name of the customer	Enter all or part of the name. The whole name must be entered if using the Exact Match Operator.

OPERATOR:

FIELD:	DEFINITION:
• **Begins With**	The string of characters the Last Name, First Name, SSN or PIN begins with.
• **Contains**	A string of characters within the Last Name, First Name, SSN or PIN.
• **Exact Match**	The string of characters exactly equal to the Last Name, First Name, SSN, or PIN.
• **Navigation Mode**	Drop down, select Retain to remain on the customer record or Search to conduct the Search function.

CRITERIA:

- The entry in the Criteria field should equal the string of characters (letters or numbers) on which the search should be based.

To change a selection in either the Field or Operator, position the mouse pointer and CLICK on the down arrow and then, using the mouse, position the pointer and CLICK on the desired selection. The selection will appear in the box. After a selection is made in the Operator field, an entry must be made in the Criteria field.

Search Tip: The "Begins With" or "Contains" searches are the most efficient search options. For best results when using these options, enter a minimum number of characters in the Criteria field. More matches may result, but there is a better chance of finding the desired customer.

NOTE: When the Search screen is requested, the entries in the Field and Operator items will be defaulted to the entries made in the last Search.

2. **Advanced Search Option**

In some searches, the system may find that the criteria used in the search results in matches of a large number of records. Rather than giving the worker several pages of names to look through, the system is designed to automatically request an advanced search if more than 30 records match the original criteria. A message appears at the bottom of the screen informing the worker that the results are incomplete.

For example, if the worker were to do a simple search on the last name Johnson, there could be several hundred matches returned. To limit this number, secondary search criteria may be added to focus the search.

Note: The option to do a secondary search is always available to workers. The double arrow link **(>>)** next to the search button opens the Advanced Search window.

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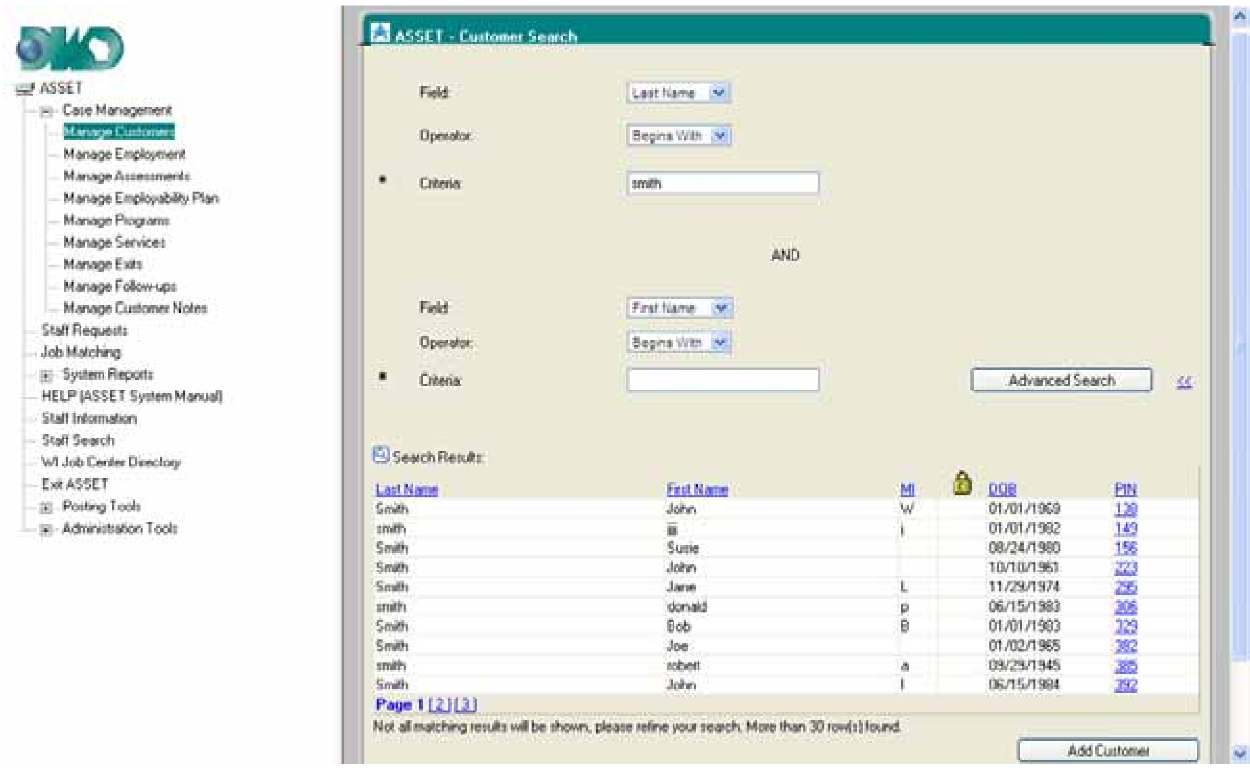
The Advanced Search page looks like this:



By adding a second criterion, such as First Name, the worker may better find the record of the customer being served.

> **CAUTION:** There is a danger in being too specific or using too few search operators when trying to locate a record for a new customer. For example, a person will use Bob instead of Robert, or Betty instead of Elizabeth, or mis-key the DOB. Workers may have to try a couple of different searches before deciding to create a new record for a customer.
>
> For Example: For the first search use a partial Last name and a partial First Name. For the second search use a partial Last Name or first name and the Date of Birth.

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