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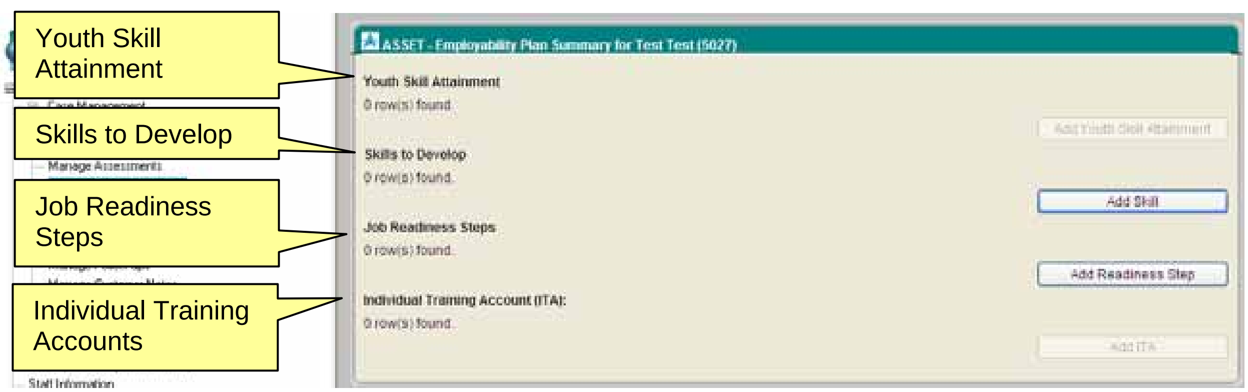
ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

Manage Employability Plans is the case management function that will provide workers with pages to record the customer's employability plan information.

When Manage Employability Plans is selected from the Menu Tree, the typical search page displays. If the customer who is being worked with is in the list of Previously Searched for Customers, clicking on that person's PIN will move to the next page. If not, the worker must do a search for the desired customer.

The page displayed below is the Employability Plan Summary page. It is a three-part page – the upper part is for Youth Employability Plans, the middle part is for Employability Plans for all other customers (includes Skills to Develop and Job Readiness Steps), and the lower part is for ITA tracking. This is what the page looks like:



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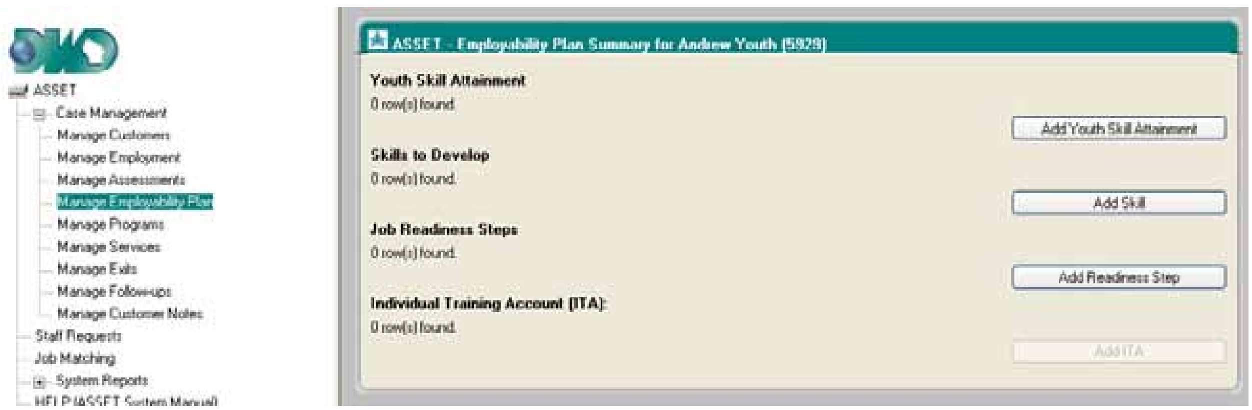
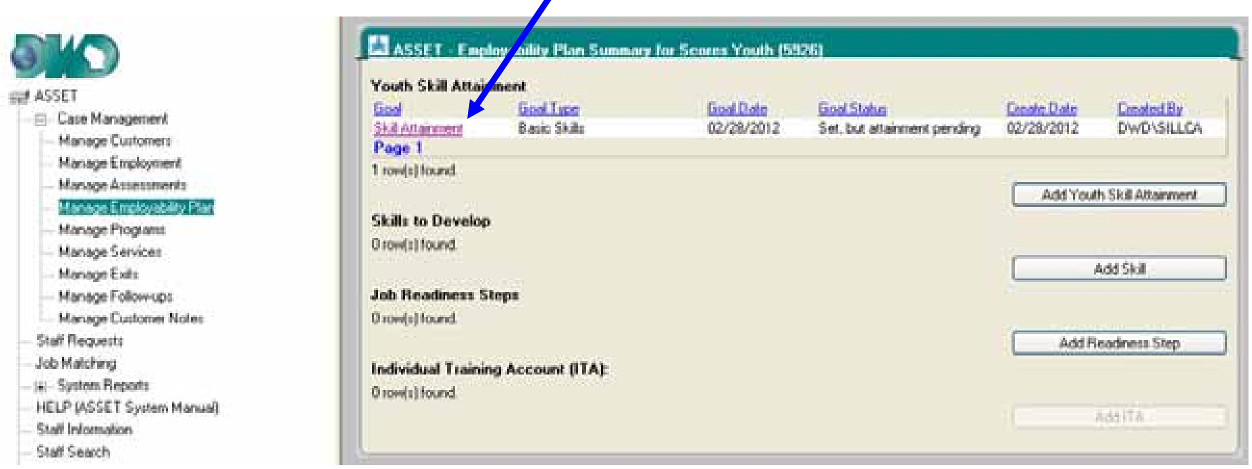
Youth Skill Attainment

Instructions for WIA Title 1 Youth Workers: If a Youth Skill Attainment record exists for this customer, some information from that plan is displayed. If no plan exists, the page displayed indicates 0 rows found; the Add Skill Attainment button is clicked to create the first Youth Skill Attainment record. If a new Plan Type needs to be created, click on the Add Skill Attainment. This is the view when no record exists:



The Employability Plan Summary looks like this if there is an existing plan. The page displays information about that plan. Click on the ***Skill Attainment*** in the Plan Type column to open the plan for updating or modifying.



Case Managers may set as many skill attainment goals as necessary and then identify the ones they want counted for performance measurement purposes. Once a response is selected and saved, changes can only be made by an Administrative Staff at the Central Office.

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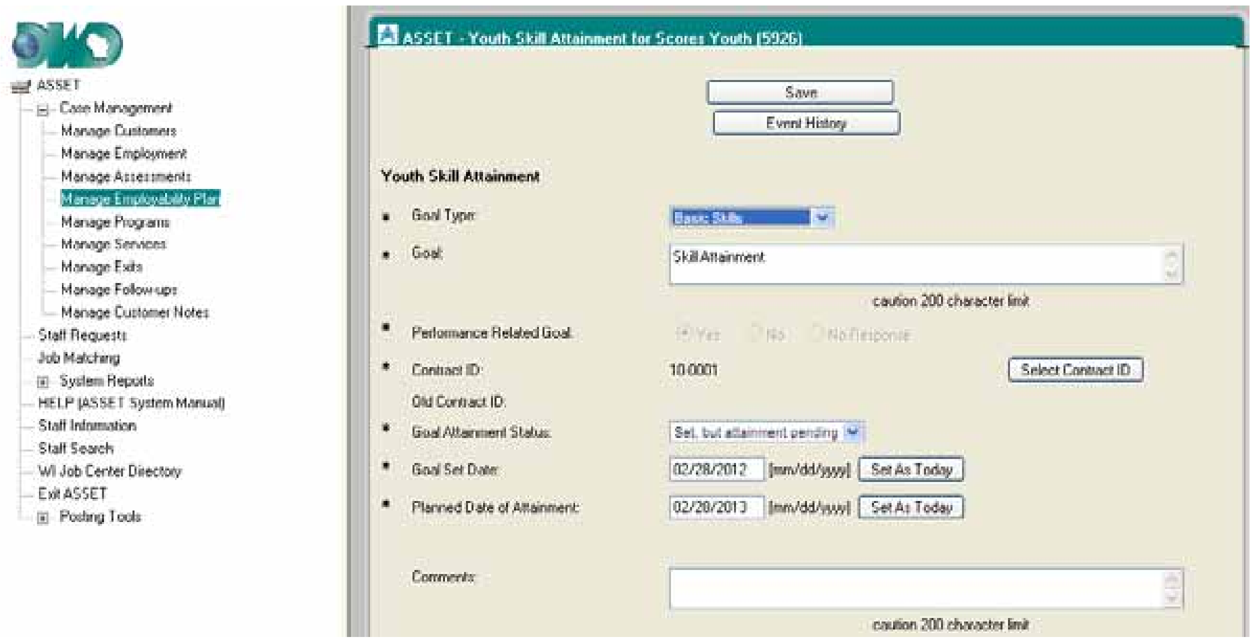
Youth Skill Attainment Record

The actual Youth Skill Attainment page consists of several data-capture fields. The page looks like this:



The following process is how goal-setting and reporting should be done in ASSET:

1. Set at least one goal for each youth participant.
2. If only one goal is set, a "Yes" or "No" response must be selected to count for performance measurement.
3. If between one and three goals are set, at least ONE must be selected to count for performance measurement.
4. If more than three goals are set, at least one, BUT NO MORE THAN THREE, must be selected to count for performance measurement.
5. If a worker selects more than three, the system extract will identify the three with the earliest set date(s) and use those for the performance measure.

Youth Skill Attainment

The Youth Program Area worker updates the Goal Attainment Status as soon as possible after a goal is either achieved or not completed as well as at WIA Title 1 Exit. This information is used for WIA Title 1 Youth performance measures.

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The fields on this page are:

FIELD NAME	REQUIRED	DESCRIPTION
Goal Type	Yes	Indicates the type of goal being set, selected from a dropdown menu. The items on the dropdown are: • Basic Skills • Occupational Skills • Work Readiness Skills
Goal	Yes	A text field to describe the goal being set.
Performance Related Goal	Yes	A Radio button where the worker needs to select Yes or No to indicate if this goal is related to Performance.
Contract ID	Yes	Click on the Select Contract ID button. This opens a pop-up window that lists available Contract ID's for a WDA.
Old Contract ID	No	Display only; used as a reference.
Goal Attainment Status	Yes	The status of the goal, selected from a dropdown menu. The items on the dropdown are: Attained – Select this status when the goal has been successfully reached. Not attained – Select this status when the goal has not been reached and the participant is no longer working on this goal. Set, but attainment pending – Select this status while the participant is working on this goal.
Goal Date	Yes	The date the goal is set.
Planned Date of Attainment	Yes	The date by which this goal should be achieved.

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FIELD NAME	REQUIRED	DESCRIPTION
Actual Date of Attainment	Yes	The date the goal is completed and this record is closed out. This field only appears if the Goal Attainment Status is set to Attained.
Comments	No	Unformatted text field for additional information
Case Manager	Yes	The Youth Case Manager responsible for completing the plan.
Office Code	Yes	The office number of the staff person completing the goal information. Defaults based on User ID.

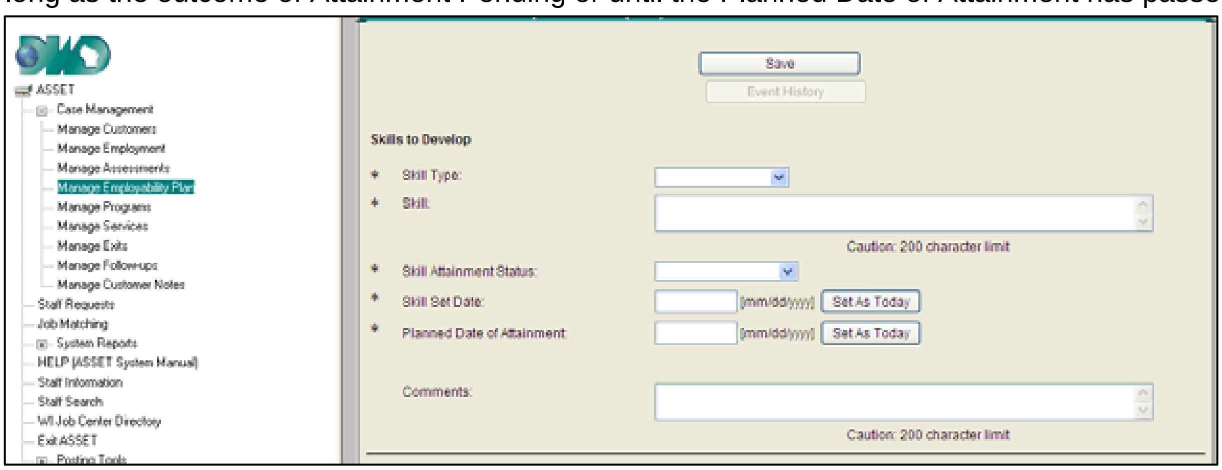
Skills to Develop
This function is where the case manager identifies the skills needed to find employment. They include educational as well as "soft skill" goals.

The Skill Type dropdown organizes the goals into categories. Included are: Basic Educational, Occupational, Work Readiness, and Other.

The Skill field is a text entry field and should state exactly the skill that needs to be attained. For example: Improved Interviewing Techniques, Resume Writing, Application Completion, Writing Letters to Employers, or Time Management are just a few of the skills that a customer may need to achieve to improve their job search success.

The Skill Attainment Status field indicates the level of Skills to Develop during participation. The Statuses are as follows: Attained, Attainment Pending, or Not Attained.

Date fields are included that capture the date the skill was set and the approximate date by when the skill should be attained. These skills will appear on the Employment Plan report as long as the outcome of Attainment Pending or until the Planned Date of Attainment has passed.



Case Managers may extend the Planned Date of Attainment to accommodate active skills that are not yet attained (attainment pending).

The fields on this page are:

FIELD NAME	REQUIRED	DESCRIPTION
Skill Type	Yes	Goal Type to Develop
Skill	Yes	Free text field that describes
Skill Attainment Status	Yes	The status of the goal, selected from a dropdown menu. The items on the dropdown are: Attained – Change to this status when the skill has been successfully reached. Attainment Pending – Set this status while the participant is working on the skill. Not Attained – Change to this status when the skill has not been reached and the participant is no longer working on this skill.
Skill Set Date	Yes	Date the skill began
Planned Date of Attainment	Yes	The date by which this Skill should be achieved.

Readiness Step
The third function is the **Add Job Readiness Step**. This section is used for listing other activities or actions the customer needs to take to prepare for employment. These steps are outside of program participation but address needs which should be considered by the customer. This could include tasks such as checking out public transportation routes and schedules, or finding backup daycare/childcare.

Like the Skills to Develop, Job Readiness Steps have Set and Planned Date of Attainment fields, and remain on the Employment Plan report until the Planned End Date expires.

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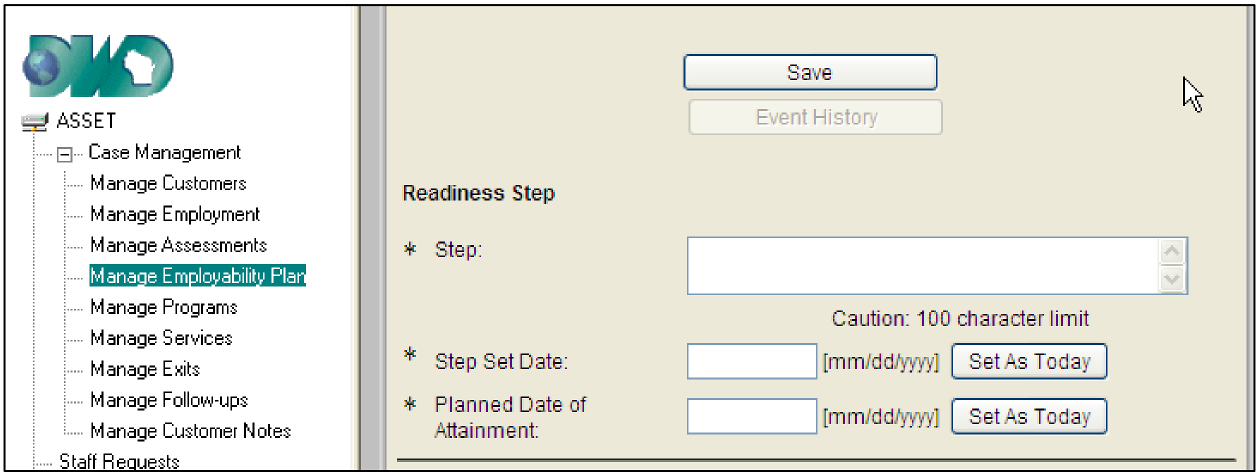
When the user clicks on the Add Job Readiness button, the page looks like this:



The fields for Readiness Step on this page are:

FIELD NAME	REQUIRED	DESCRIPTION
Step	Yes	Free Text field describing activities or actions needed to prepare for employment.
Step Set Date	Yes	Date the Step began
Planned Date of Attainment	Yes	The date by which the Readiness Step should be achieved.

Individual Training Account (ITA)

Until the first ITA is entered for the customer there will not be any rows displayed on this page. By clicking on the Add ITA button even though the customer may have had an ITA granted to them prior to the time this functionality was implemented in the system. This button is activated only for participants who are registered in the WIA Title 1 Adult or Dislocated Worker Program Areas.

ITA tracking in ASSET provides WDBs with management information about ITA services through the Job Center Systems Data Warehouse. The functionality can assist in local and state monitoring of ITA participation by our customers.

NOTE: The ITA tracking is placed within the Manage Employability Plan module because training is a component of the customer's general plan for moving toward self-sufficiency. It is not a substitute for the comprehensive Employability Development Plan required under WIA policy.

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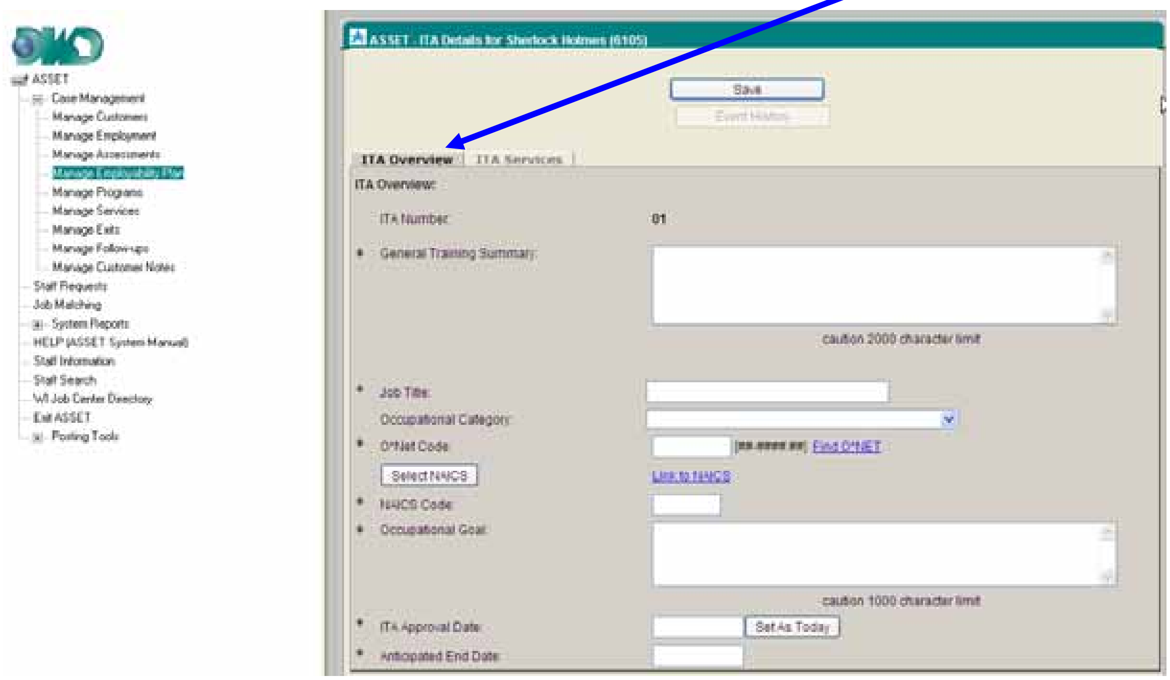
Instructions for WIA Title 1 Adult and Dislocated Worker ITA Tracking:
New ITA information is added to ASSET Training Environment by clicking on the **Add ITA** button. This opens a new page that consists of two tabs. The first tab is used to establish the ITA Overview and gives it an ***ITA Number*** within ASSET. Staff must Save the information entered on this tab before attempting to enter ITA Services. This is a view of the page.



The fields on this page are:

FIELD NAME	REQUIRED	DESCRIPTION
ITA Number	NA	A system-generated number (sequential) that ASSET uses to relate all training to a specific customer. A customer can be approved for one or more training programs under a single ITA grant. It is necessary to open a separate Training Service for **each training program** (as listed in the Eligible Training Provider list) even though just one ITA grant was approved. The same ITA number can be used on one or more services.

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FIELD NAME	REQUIRED	DESCRIPTION
General Training Summary	Yes	This is a text field for workers to enter information about the ITA program which is being made available to the customer. The kind of information might include: • Statement of the training program type • Statement about the length of the training program and a summary of the overall timetable and plan for completing the training
Job Title	Yes	Name of the Job Title that corresponds to the ITA number.
Occupational Category	Yes	The Occupational Category related to the Job Title.
O*NET Code	Yes	The O*NET code of the occupation for which the participant is receiving training. This code can differ significantly from the O*NET code in the Customer Record. Once training is completed, the Customer Record O*NET list should include the one for the training occupation.
NAICS	Yes	The NAICS code is 6 digits. This code can be entered by staff and should closely relate to the industry sector of the training provided. When the NAICS code is entered the page refreshes and a description of the selection is auto-populated in the section.
Occupational Goal	Yes	A text box where the worker must indicate the employment goal for this participant. This can a general job title, such as welder, or more specific title such as Certified Nursing Assistant -Hospital Pediatrics.
ITA Approval Date	Yes	The date WDA providing the ITA approves the expenditure of funds for this customer.

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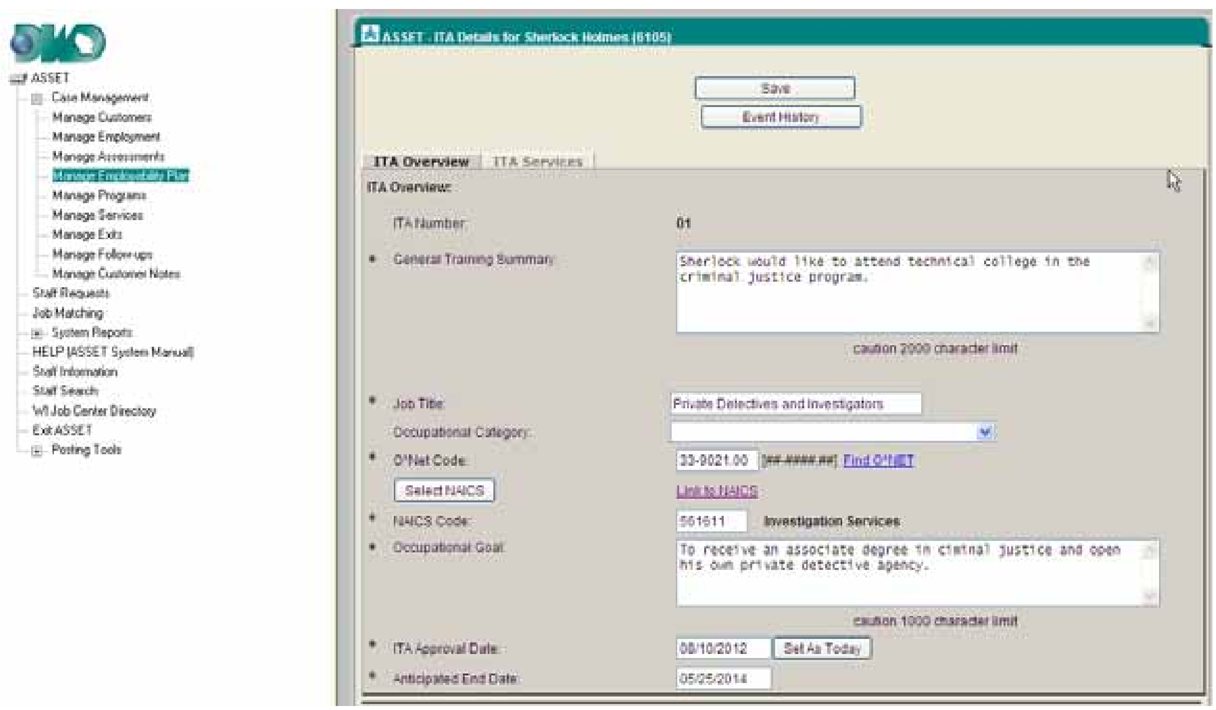
FIELD NAME	REQUIRED	DESCRIPTION
Anticipated End Date	Yes	The date the worker and the customer have agreed that training should be completed.
By Block	Yes	The By Block is common to all ASSET pages and includes Case Manager, Staff Type, Office Code and WDA. These items are needed for informational and management purposes.

After completing the fields on the first tab, save the record by clicking on the Save button at the top or bottom of the page. Once saved, proceed to the second tab – ITA Services.

This is an example of the ITA Overview tab once data has been entered and saved:



ITA Services Page:
The ITA Services page is a display of information about the specific training program funded under the ITA. The information on this page is the same information as in Manage Services once the Training Service is connected to the ITA Number established on the ITA Overview page. (It is the ITA Number that links the two pieces of functionality in ASSET.)

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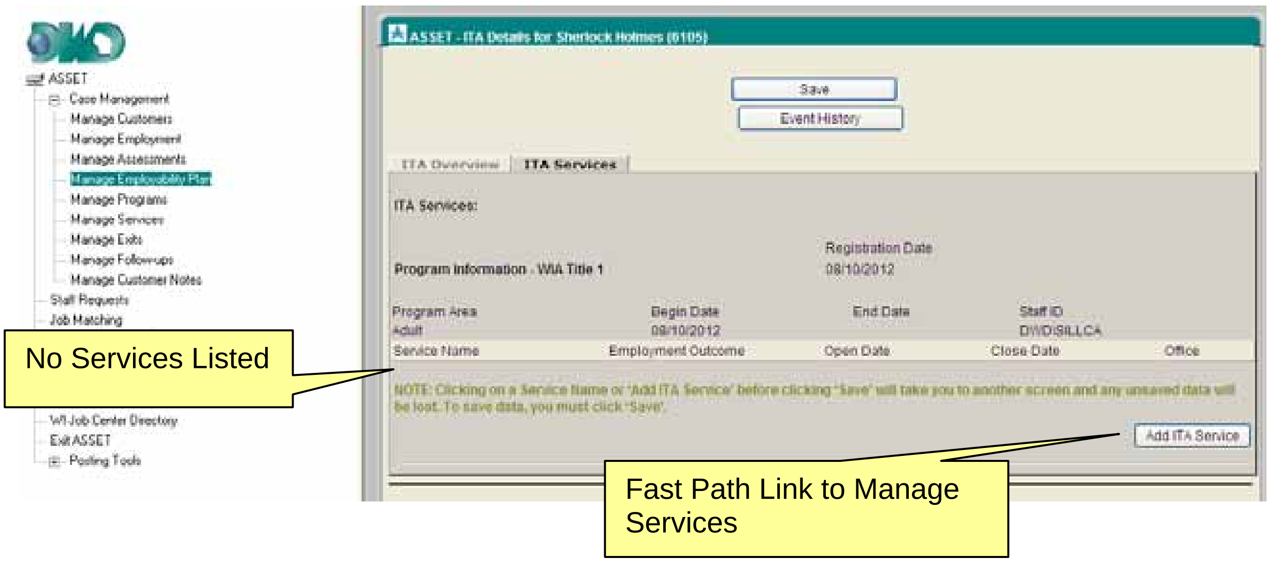
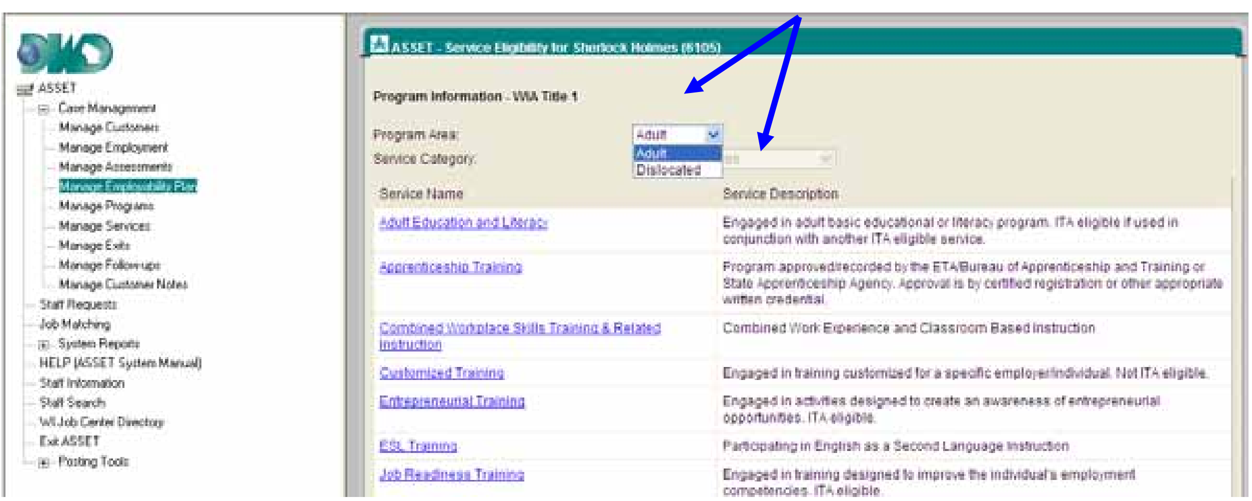
This is a display of the page when a new ITA training service is being created (no details because no Training Service has been opened). Note that the page gives Program Area information, but there are no services listed. There is a "Fast Path" button to add a service.



When the "Add ITA Service" link is used, the worker is taken directly to the Service Eligibility page – and the service category of Training is already selected. Note: Customers with both Adult and Dislocated Worker program area will have to select which Program Area is funding the ITA from the dropdown, but Training Services is already selected.



The worker must then select the appropriate Training Service for the ITA. The definition of each training service has been modified to indicate if that particular service is eligible to be covered

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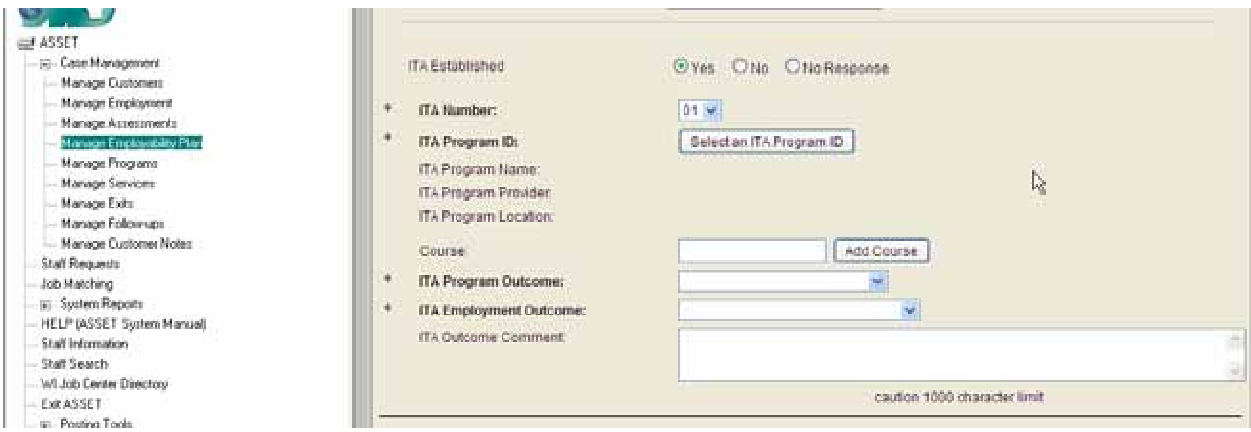
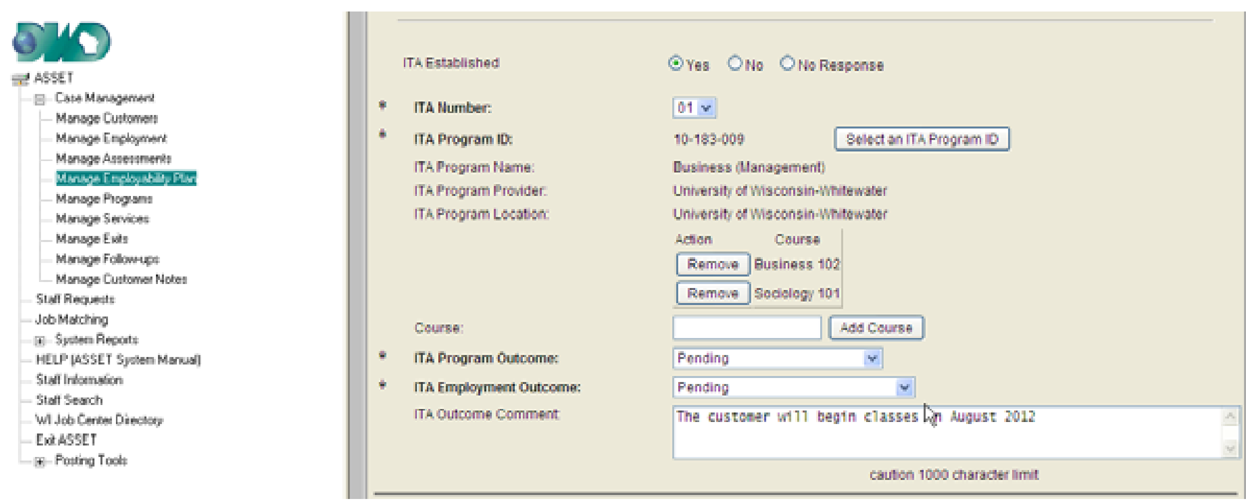
by an ITA. Only those services appear in the list when coming to Manage Services via the ITA Link. When the appropriate training service is selected, the Service Detail page displays. Workers should complete all the required items. The ITA functionality added to the Service page is dynamic (meaning it appears) only when the **ITA Established** response is changed to **YES**. See the 3-7 Manage Services in this ASSET User Guide for a complete discussion and definitions of this functionality.

This is how the new portion of the service page looks once the Yes button is clicked and the new fields appear as shown on the next page.



This is how the Manage Service page looks with the above items completed:



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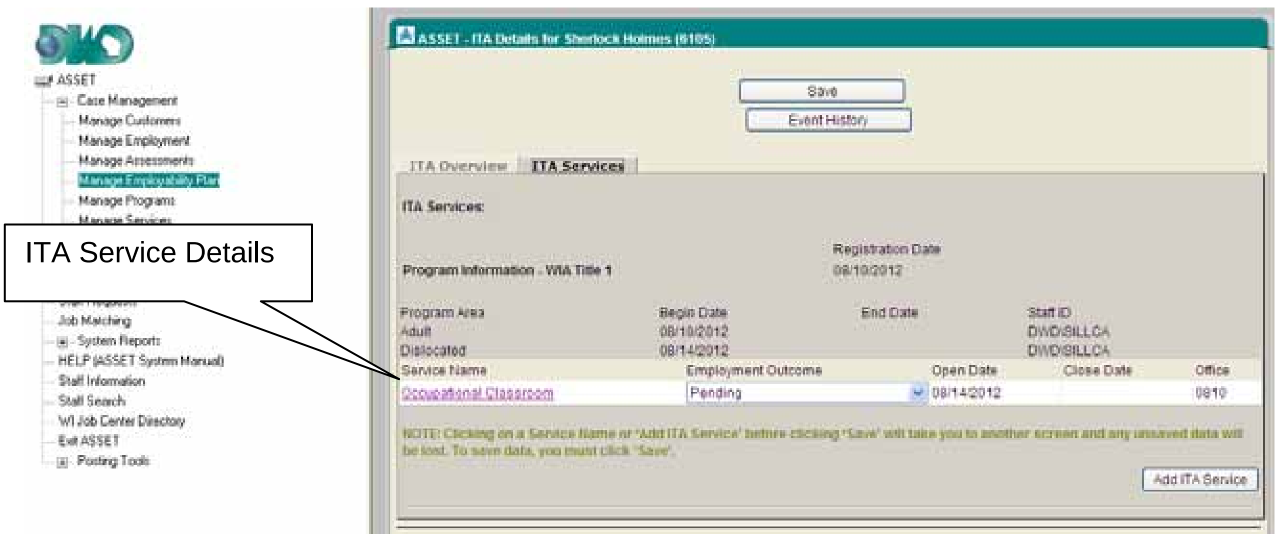
If a Training Service was created by coming to the Manage Services function via the Fast Path link from the ITA Details page, clicking on the Save button returns the user to the ITA in Manage Employability Plans. This is a display of the ITA Services tab once the Training Service has been completed and saved:



Workers may view and update the ITA training service by either going directly to the service using the Manage Services functionality or by going to the ITA Tracking in Manage Employability Plans and clicking on the link to the service from there.

> **NOTE:**
> **The ITA Detail page and the Service Details associated with it are designed to track specific Training Programs as identified by the assigned program number in the list of Eligible Training Providers. If an individual is being provided ITA resources to enroll in more than one Training Program, it will be necessary to create two Training Services with the same ITA Number and different Training Program numbers. This does not apply to multiple classes within a single program. ASSET uses an ETP application in displaying the list of Eligible Training Providers when using the ITA functionality. When you select an ITA Program ID, the ITA Program Provide Lookup table that pops up has a Detailed Info link that opens to the State's ETP page.**

In the example displayed on the next page, a single ITA is funding two different training programs. Each one is shown as a separate service. In this situation, one training program is Entrepreneurial Training and the other is Occupational Classroom, although both might have been the same service type. If both were classroom training, then there should have been two Classroom Training services completed – one for each program.

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The reason this multiple reporting is necessary is for the performance evaluation of each Training Program. Example: the customer is in both a Small Business Marketing program (3 classes) with a program number xx-xxxx-xx, and also Small Business Financial Management program (4 courses) with a program number zz-zzzz-zz. Both programs must be tracked separately so each may be evaluated for success.

Here, one ITA has two services open and each is shown as a link. Click on this link to get back to the Manage Services function to update it as long as that service is not closed. Once the service is closed or the Program Area has ended, the only way to update the Employment Outcome for this training service is on the ITA Services page.

Manage Employability Plan – ITA Tracking function may be updated at any time, even after the Training service has closed or the Program has been exited. This is important to remember because the Employment Outcome information on the ITA Services tab remains available for update although the service in Manage Service is no longer available. At Follow-up the customer reports a change in employment to a job that is training related. The only way to update the Employment Outcome to show Employment-Training Related is on this page.

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ITAs Established Prior to ITA Functionality in ASSET:
Many customers have received approval for ITA training prior to the implementation of ITA tracking in ASSET. If a customer is open for a Training Service under an ITA that existed before the system functionality was available, it will be necessary to create the ITA Overview page to create an ITA Number **before** that service is updated or closed. (The system edits in Manage Services prevent the service from being updated because there is missing required information – the ITA Number and Program Number.)

However, unlike new ITAs, the worker **must click on Manage Services** on the Menu Tree to update an already existing Training Service funded by the ITA after creating the new ITA Overview page. **Do not use the link on the ITA Services page** to attempt to add the ITA number to already open Training Service because the "fast path" is designed to create a new training service.

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