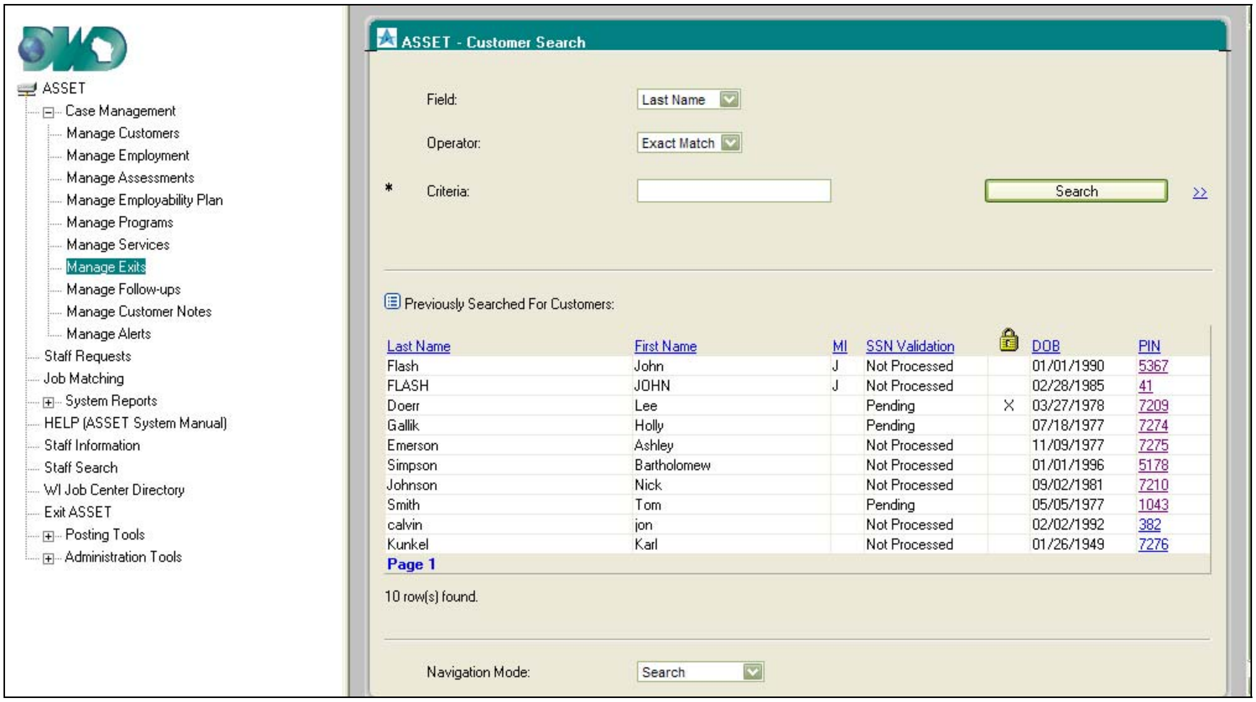
Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

The Manage Exit function is launched from the ASSET Menu Tree. Clicking on this option opens the ASSET Customer Search screen. The search is performed by entering the Search or Advanced Search criteria for the customer. Following is an example of the Customer Search screen for Manage Exits.

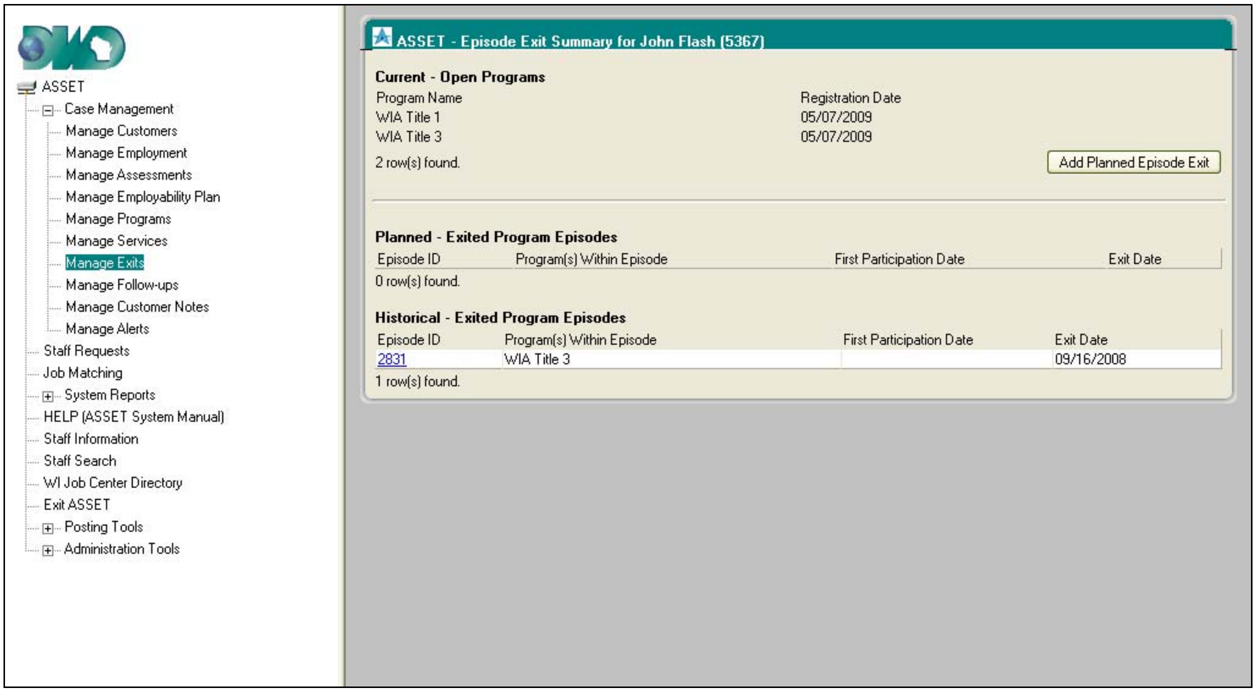


When a worker clicks on the PIN, ASSET automatically retrieves the customer's Episode Exit Summary. The summary returned displays the Current – Open Programs, the Planned Exited Program Episodes, and the Historical Exited Program information as shown in the following example.

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____



Planned Exits

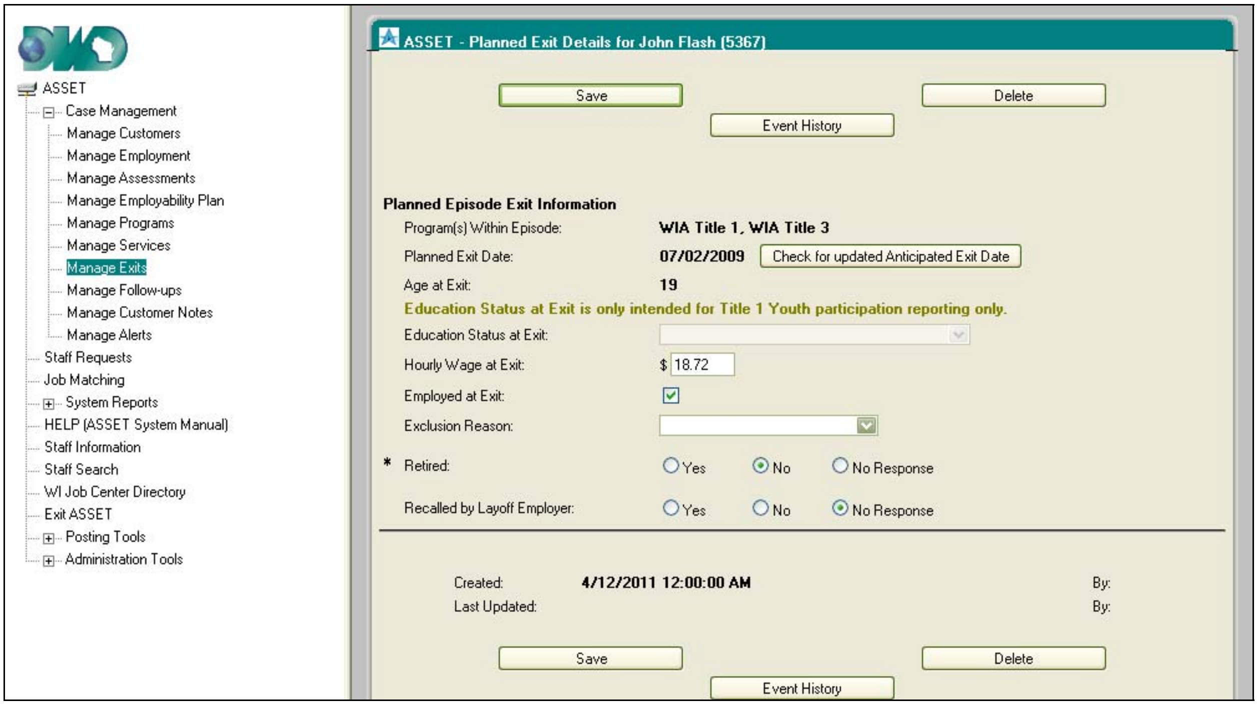
A Planned Exit can be created when there is an Open Program with a Registration Date present in ASSET and the **Add Planned Exit Episode** button is available on the Episode Exit Summary.

The Planned Exit is created by clicking on the **Add Planned Episode Exit** button. This launches the **Planned Exit Details** screen. The Planned Exit Details screen is a simple data entry screen where the worker can enter pre-exit information, as shown in the following example.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____



The Field Descriptions are:

FIELD	REQUIRED	DEFINITION
Program(s) within Episode	NA	System-generated from saved Program Registration. Displays the applicable programs within the episode.
Date of Planned Exit	NA	System-calculated using the latest service date of a service with an actual open service date.
Check for updated Anticipated Exit Date	Button	Clicking this button checks the ASSET system for an updated (i.e. more recent) latest service date in order to recalculate the Date of Planned Exit.
Age at Exit	NA	Displays the age of the participant at Planned Exit (uses the system-calculated from D.O.B. field on the Manage Customer screen.

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

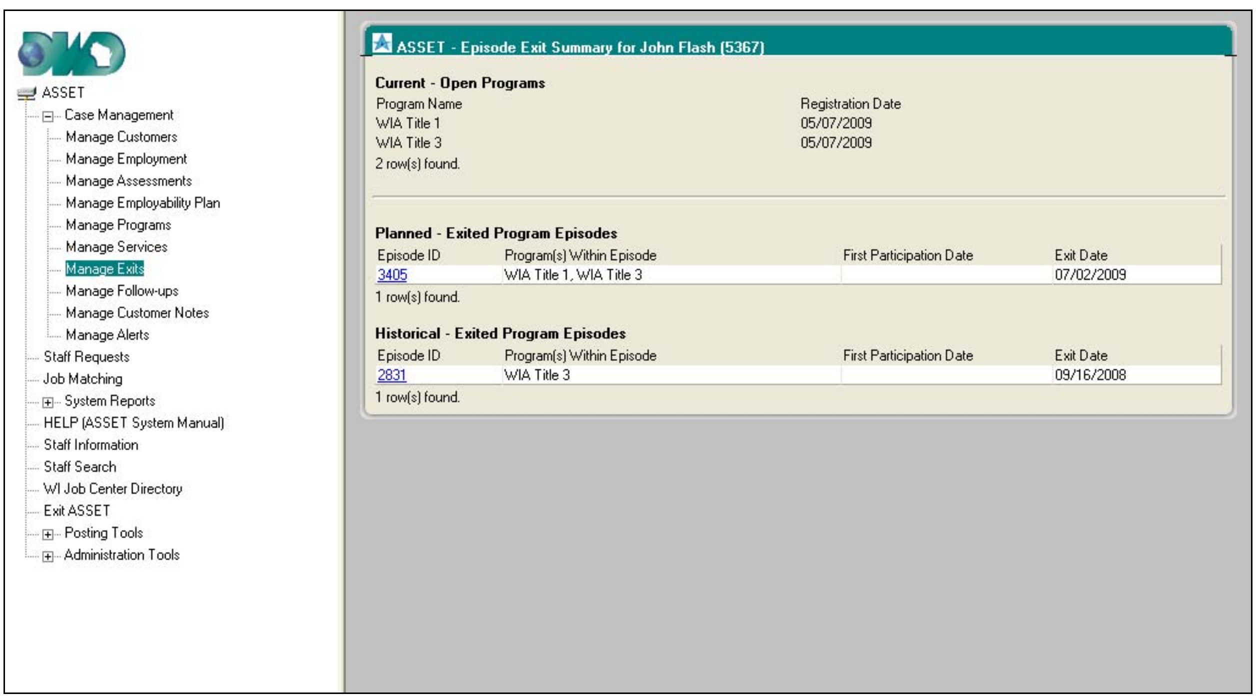
FIELD	REQUIRED	DEFINITION
Education Status at Exit	No	Dropdown field in which users can select the appropriate response that identifies the participant education status at the time of the Title 1 planned exit. If a system-planned exit is generated (soft planned exit), the education status will be the response that is currently on the Manage Customer screen. A response is required for all youth participants. Education status at Exit is intended only for Title 1 Youth participation reporting only; this field is enabled only for Title 1 Youth participants.
Hourly Wage at Exit	No	Text field in which users can enter the wages the participant is earning at the time of the planned exit.
Employed at Exit	No	Check Box that, when clicked, indicates the participant is employed at the time of the planned exit.
Exclusion Reason	No	Dropdown field that, for WIA Title 1 and TAA Program Exists, should be completed if the customer is being exited for a reason other than completion of program participation. The dropdown menu options include: • Institutionalized • Health/Medical • Deceased • Family Care • Reservists Called to Active Duty
Retired	Yes	Radio buttons with which the user can select Yes or No to indicate whether the participant is retired on the date of planned exit. Used as an Exit Reason but does not count as a WIA exclusion for performance.

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

FIELD	REQUIRED	DEFINITION
Recalled by Layoff Employer	No*	Radio buttons with which the user can select Yes or No to indicate whether the participant was recalled by a layoff employer at the time of the planned exit. *This field is required only when the individual is enrolled in a TAA program.

After completing or updating the information, the worker should click on the **Save** button. The exit information is now recorded in ASSET. Once saved, the Episode Exit Summary screen will display showing the Planned Exit information in the Planned – Exited Program Episodes section. The Planned Exit can be updated at anytime by simply clicking on the PIN under the Episode ID. Staff should review the Planned Exited Program Episode screen periodically to ensure that the data is correct.



ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

Event History will track the fields changed, the date the changes occurred, and the staff who made the changes. The tracked changes will populate the automated exit screen in ASSET.

The Planned Exit Details screen is no longer available for updates once the system-automated exit occurs. The Planned Exit Details screen is replaced by the Exit Details Summary screen.

The Automated Exit is generated via the system exit batch processing (90-day) exit. This is the design logic:

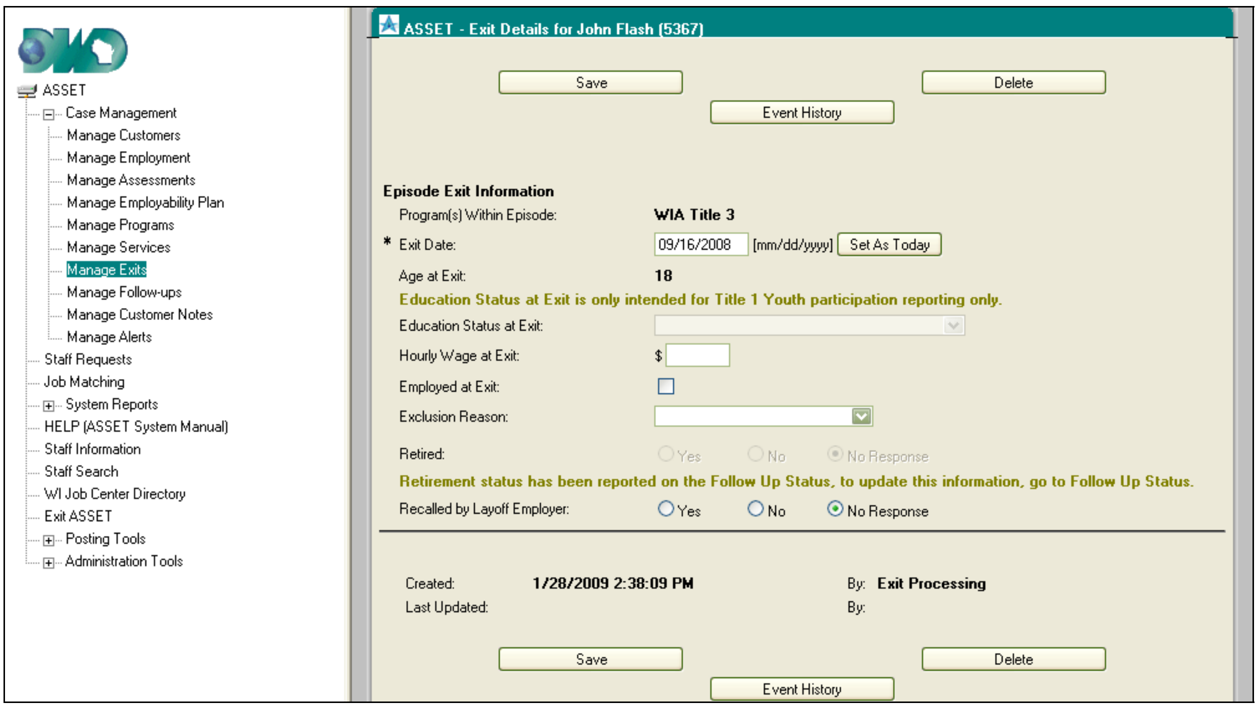
PROGRAM	CONDITIONS
WIA Title 1, Title 3, TAA, or any Job Center Partner Program	A system exit is generated when: • A participant has not received a service funded by U.S. DOL Programs or funded by a partner program for 90 consecutive calendar days. The Exit Date is the last day of service.

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

Historical Exits

When on the Episode Exit Summary screen, clicking on the customer PIN located under the Historical Exited Program Episodes, Episode ID column launches the ASSET Exit Details screen. An example of this screen is shown below.



The information on this screen is auto-populated from the Planned Exit or from Exit Processing (batch). After completed or updating the information, the worker should click on the Save button. Event History will track who made the changes, what fields were changed and the date changes occurred.

FIELD	REQUIRED	DEFINITION
Program(s) within Episode	NA	System-generated from saved Program Registration. Displays the applicable programs within the episode.
Exit Date	Yes	Text field that is auto-populated once the system-generated exit has occurred. The format is mm/dd/yyyy.

Set As Today	Button	When clicked, this button will re-set the Exit Date to today's date.
Age at Exit	NA	Display-only field showing the age of the participant at the time of exit (system-calculated from D.O.B. from the Manage Customer screen).
Education Status at Exit	No	Dropdown field in which users can select the appropriate response that identifies the participant education status at the time of the Title 1 exit. If a system exit is generated, the education status will be the response that is currently on the Manage Customer screen. A response is required for all youth participants. Education status at Exit is intended only for Title 1 Youth participation reporting only; this field is enabled only for Title 1 Youth participants.
Hourly Wage at Exit	No	Text field in which users can enter the wages the participant is earning at the time of the exit.
Employed at Exit	No	Check Box that, when clicked, indicates the participant is employed at the time of the exit.
Exclusion Reason	No	Dropdown field that, for WIA Title 1 and TAA Program Exists, should be completed if the customer is being exited for a reason other than completion of program participation. The dropdown menu options include: • Institutionalized • Health/Medical • Deceased • Family Care • Reservists Called to Active Duty

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

Retired	Yes	Radio buttons with which the user can select Yes or No to indicate whether the participant is retired on the date of exit. Used as an Exit Reason but does not count as a WIA exclusion for performance. If the retirement status has been reported on Manage Follow-Ups, this field will not be available for selection (grayed out); users must update the information on Manage Follow-Ups.
Recalled by Layoff Employer	No*	Radio buttons with which the user can select Yes or No to indicate whether the participant was recalled by a layoff employer at the time of exit. *This field is required only when the individual is enrolled in a TAA program.

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 the Touchscreen JobNet, JobNet 3.0 or Job Center of Wisconsin (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 Wagener-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).

Return to Index – Click here