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.

ASSET CASE MANAGEMENT

3-1____STRUCTURE OF SYSTEM FUNCTIONS____

- **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

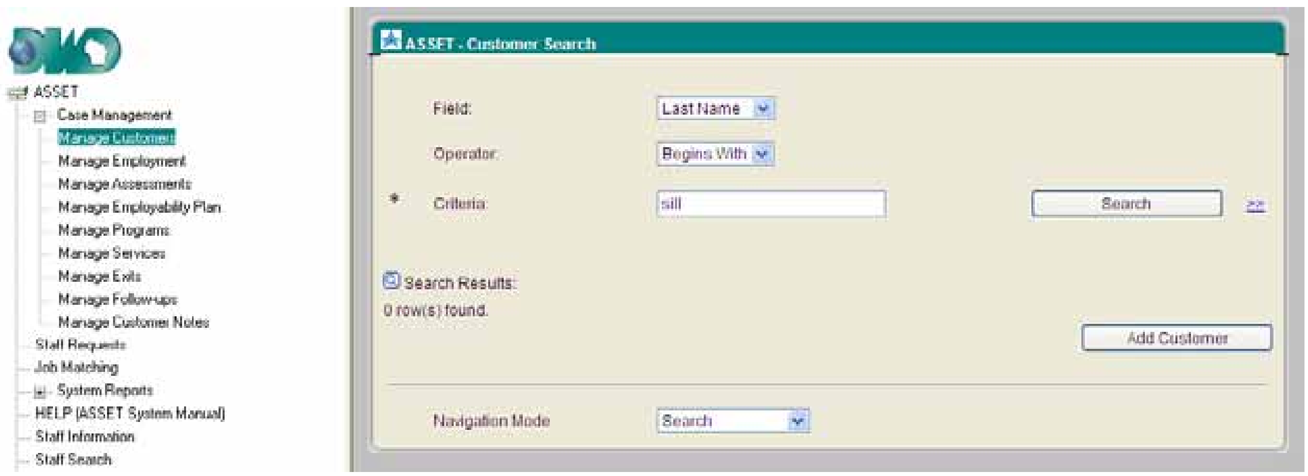
The process begins by clicking on any "Manage" function in the Menu Tree. This opens the Customer Search screen as shown on the next page. Workers must become familiar with the search process so that they can specifically identify their own customers or determine that the customer being served is not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

![ASSET] # Users' Guide

ASSET CASE MANAGEMENT

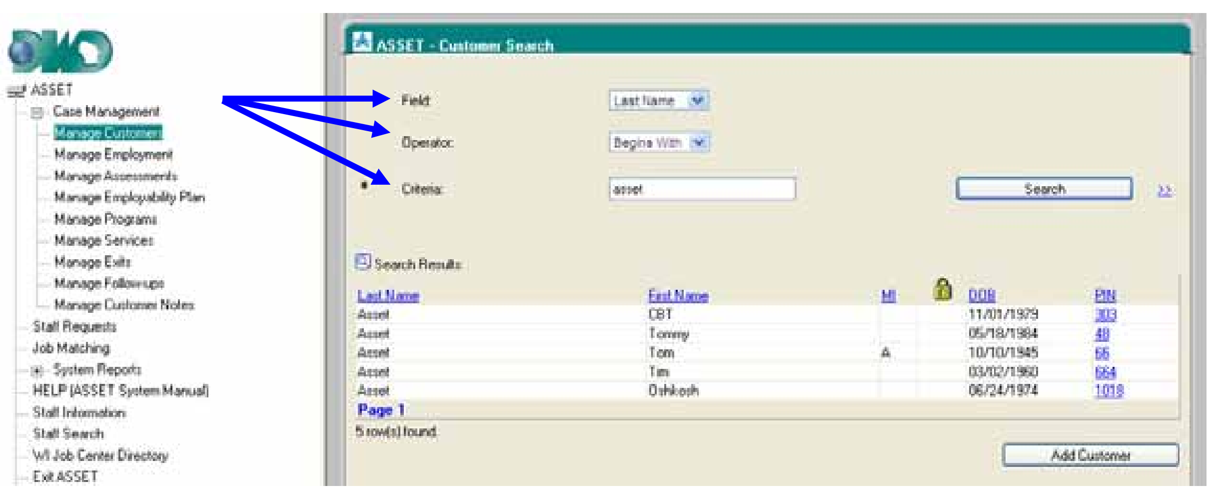
3-1____STRUCTURE OF SYSTEM FUNCTIONS____



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.

ASSET CASE MANAGEMENT

3-1____STRUCTURE OF SYSTEM FUNCTIONS____

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.

ASSET CASE MANAGEMENT

3-1____STRUCTURE OF SYSTEM FUNCTIONS____

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.

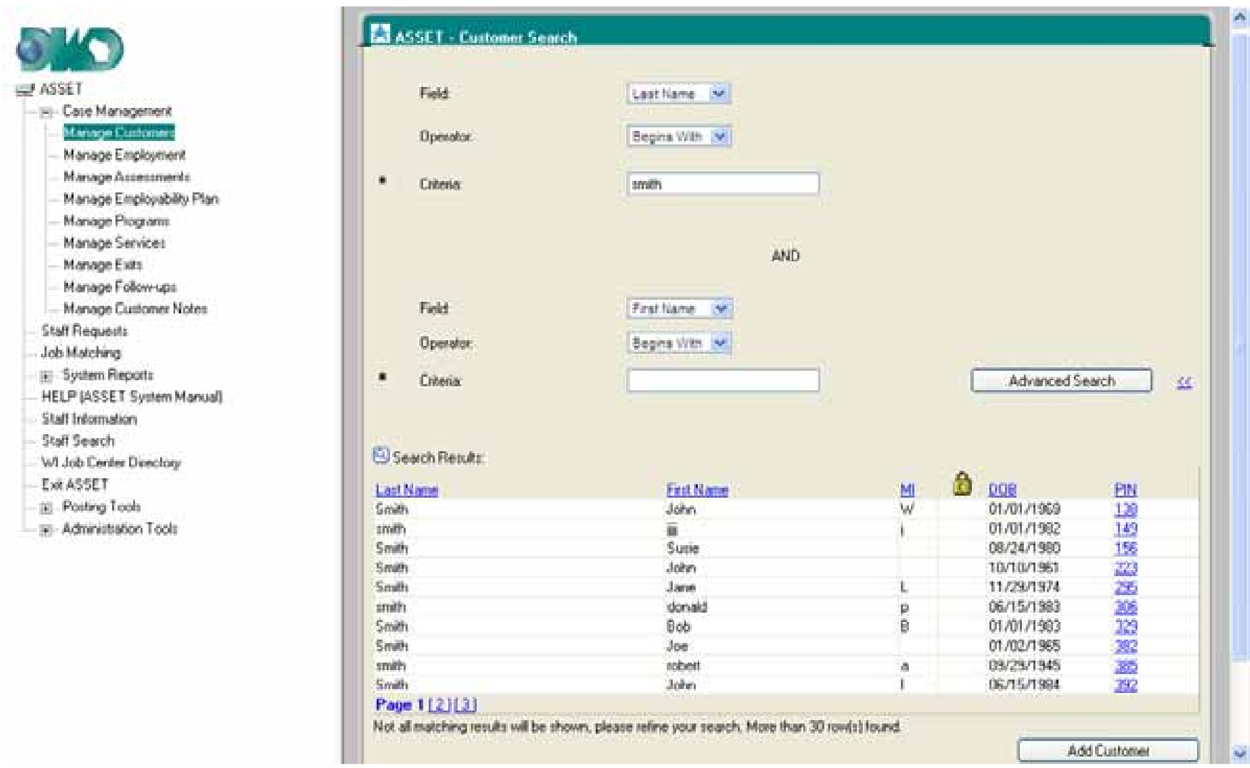
Note: The option to do a secondary search is always available to workers. The double arrow link **(>>)** next to the search button opens the Advanced Search window.

Users' Guide

ASSET CASE MANAGEMENT

3-1____STRUCTURE OF SYSTEM FUNCTIONS____

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.

[Return to Index – Click Here]

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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

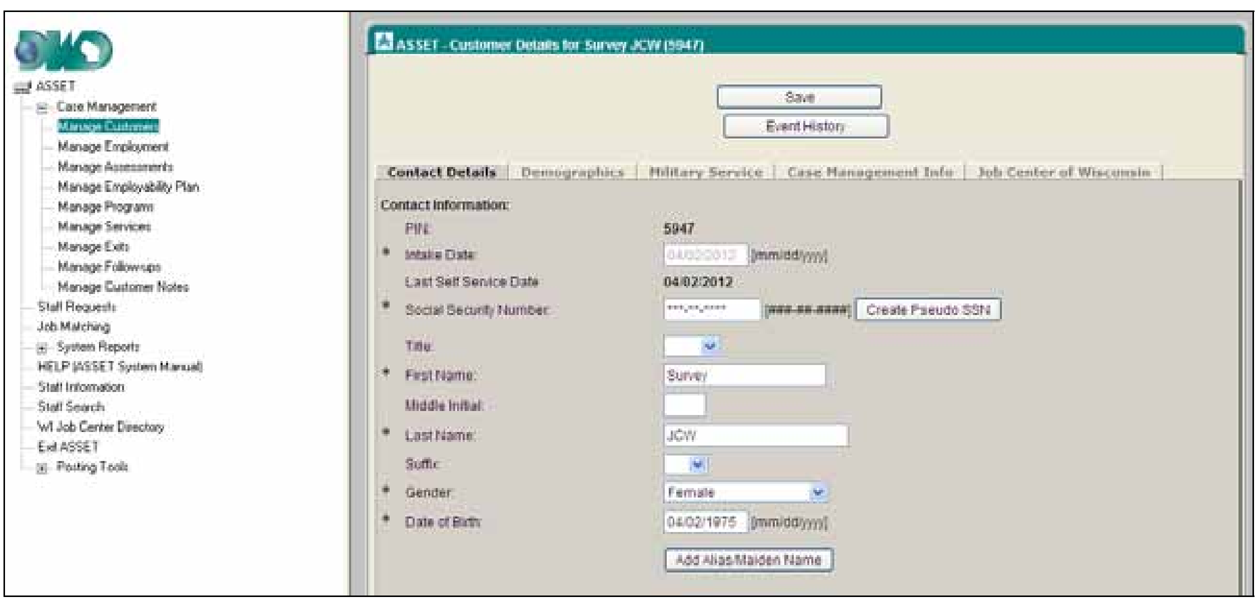
In the view of the Customer Details page, the Menu Tree remains open to the left and the data capture section is on the right. There will be a SAVE button at the top and bottom of every data capture section.

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.

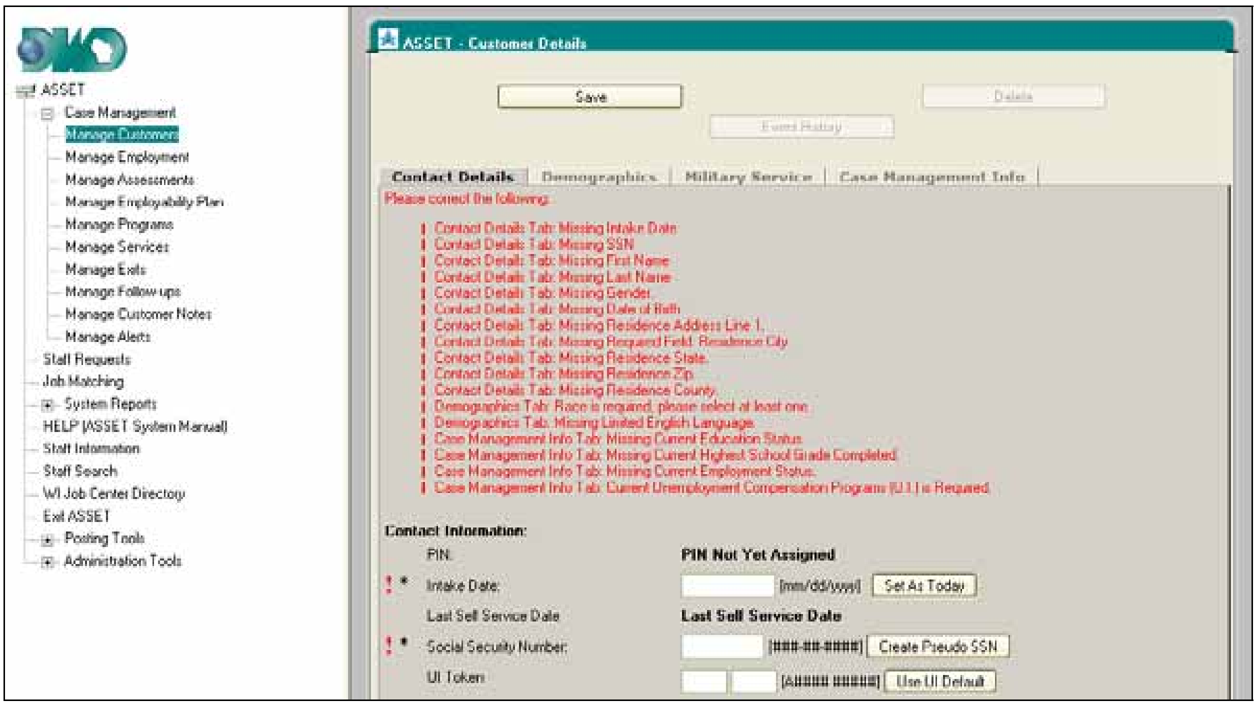
Here is an example of the Customer Details record, showing **Contact Details** as the active tab:



ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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.



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 original "creator" and the subsequent "updaters". The By Block includes other data fields, depending on the Manage function open.

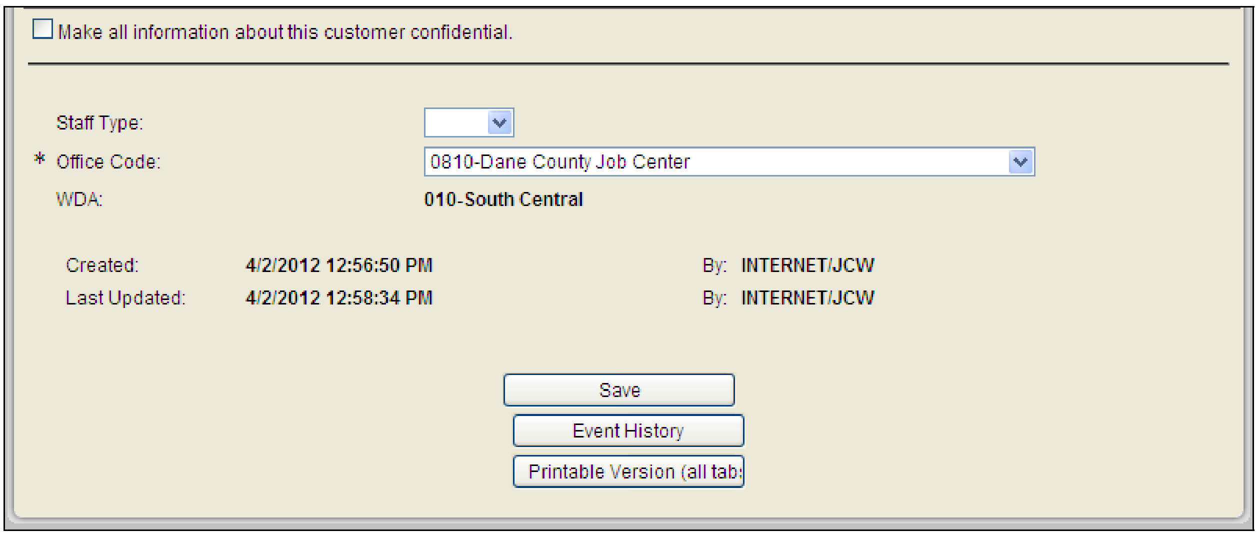
Over time, this "By Block" information may change to reflect a new Office and WDA with whom the customer is associated. Initially, this information is pre-filled by JCW based on the customer's place of registration. If a conversion is created, the Created By information will have CONVERT auto populated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

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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:



Contact Details Tab

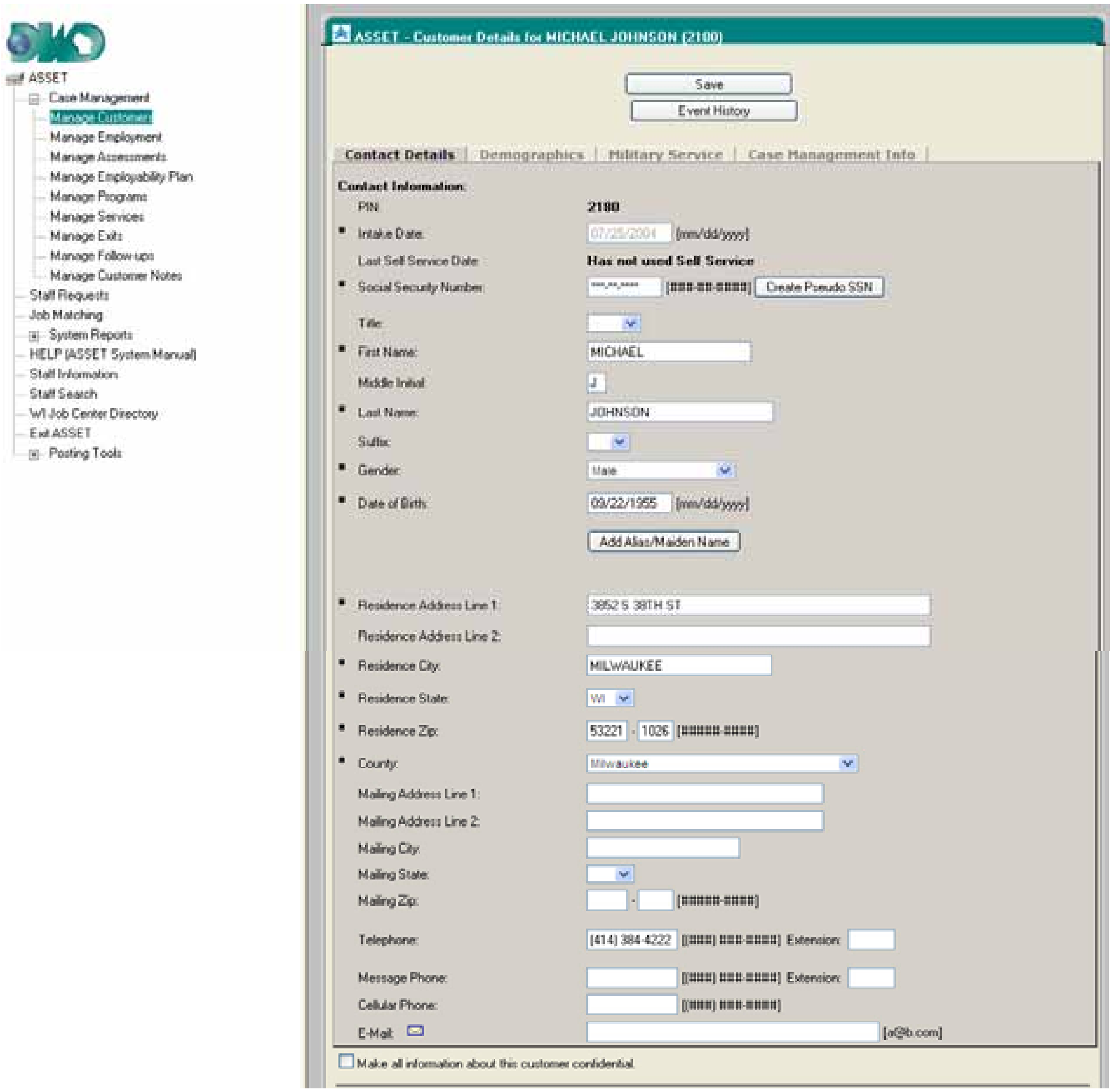
The first tab contains base data about the customer. It is not possible to show the full length of the entire page on one screen – the user will need to scroll using the scroll bar at the right of the screen to see all the items.

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

The entire page looks like this:



3-2 _____ MANAGE CUSTOMERS_____

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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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.

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.

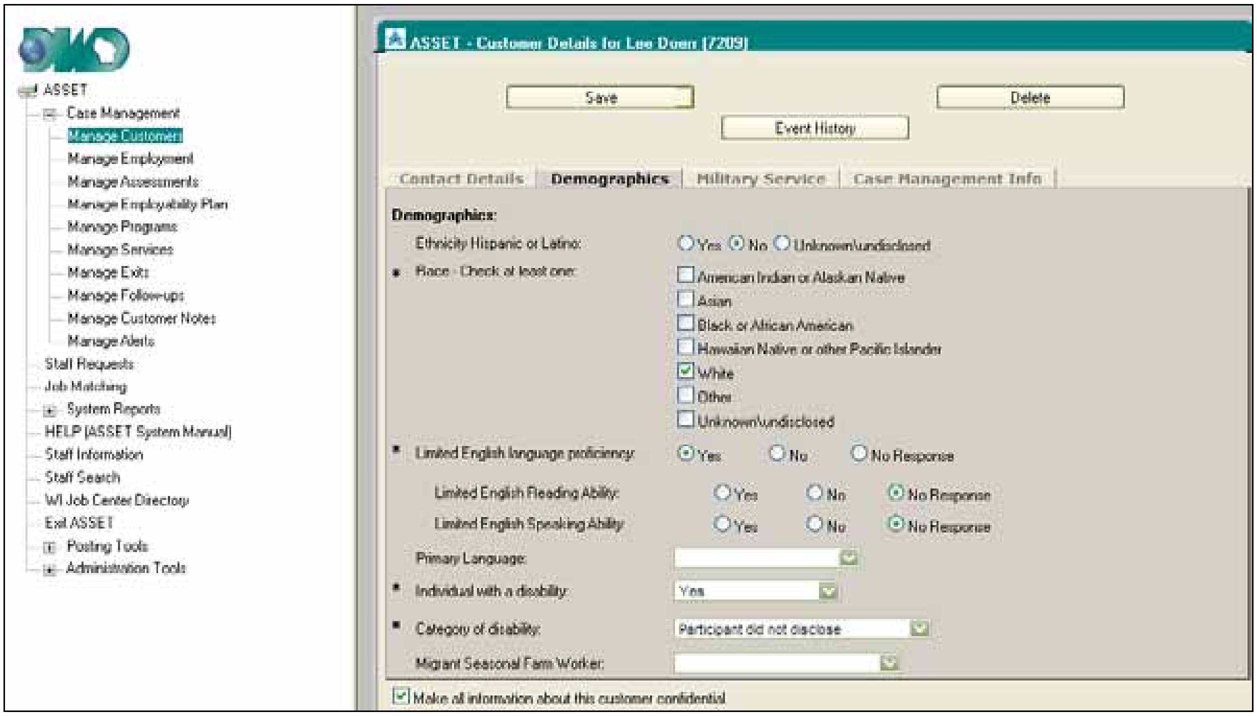
Demographics Tab

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.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____



ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Ethnicity Hispanic or Latino	No	Either Yes, No, or Unknown/Undisclosed.
Race	Yes	At least one race must be marked and more than one can be marked if the customer is of a combination thereof. • 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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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. • Physical Impairment • Mental Impairment • Both Physical and Mental Impairments • Participant did not disclose

FIELD	REQUIRED	DESCRIPTION
Migrant Seasonal Farm Worker	No	Identifies the status of the customer as a migrant seasonal farm worker. Selections are: • 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.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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:

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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	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: <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. <u>Other Eligible</u>: the spouse of any of the following - 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.

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.

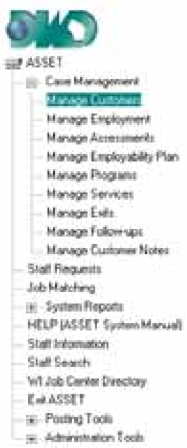
Recently Separated Veteran: The WIA Title IB program definition is that the individual is a veteran who applied for participation under WIA Title I within 48 months after discharge or release from active U.S. military, navel, or air service.

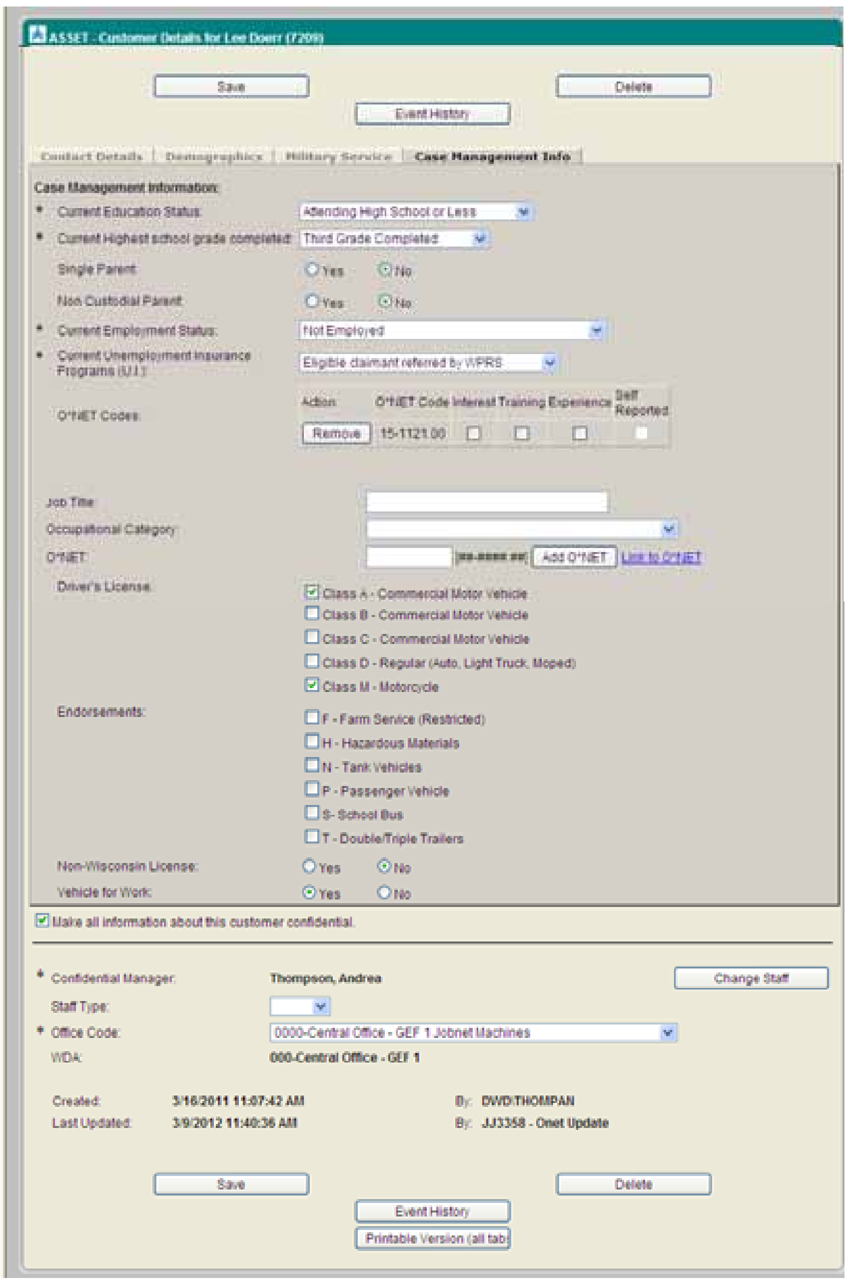
ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

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 CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

The Field Definitions are:

FIELD	REQUIRED	DEFINITION
Current Education Status	Yes	This field indicates the customer Education Status at intake. Choices are: • 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	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. NOTE: A person who finishes 12^{th} grade but does not receive a HS diploma or equivalent is considered to have completed only 11^{th} grade.
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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

FIELD	REQUIRED	DEFINITION
Current Employment Status	Yes	The individual's employment status at intake. One of the responses must be selected. • 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	Shows the customer's Unemployment Insurance (UI) status as entered in JCW. • 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	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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

FIELD	REQUIRED	DEFINITION
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.

ASSET CASE MANAGEMENT FUNCTION

3-2 _____ MANAGE CUSTOMERS_____

FIELD	REQUIRED	DEFINITION
Driver's License	No	Check all appropriate boxes indicating the class of driver's license(s) held by the customer. ▪ **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.

FIELD	REQUIRED	DEFINITION
Endorsements	No	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: **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.

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:

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).

[Return to Index – Click here]

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-3 ____MANAGE EMPLOYMENT____

The Manage Employment function will present a new page first (Employment Summary page) that shows a listing of all job history for the selected participant. The purpose of this function is so that Case Managers can see at a glance the Employer(s) Name for whom the person worked, their Job Title, and the Start and End dates of the employment.

Workers may view any of the details for an existing employer record by clicking on the underlined employer name link or may create a new employment record by clicking the Add Job button. An existing record may be updated at any time. The Employment Details screen captures all the information related to a customer's previous job(s).

There are four questions that will require a response when adding a new job (or updating an existing record). They include:

1. Is this employer a Federal Contractor?
   Check "Yes," if this employer is identified on the Federal Contractor Job Listing (FCJL).

2. Is this job a Federal Job?
   Check "Yes," if this job is a federal government employer.

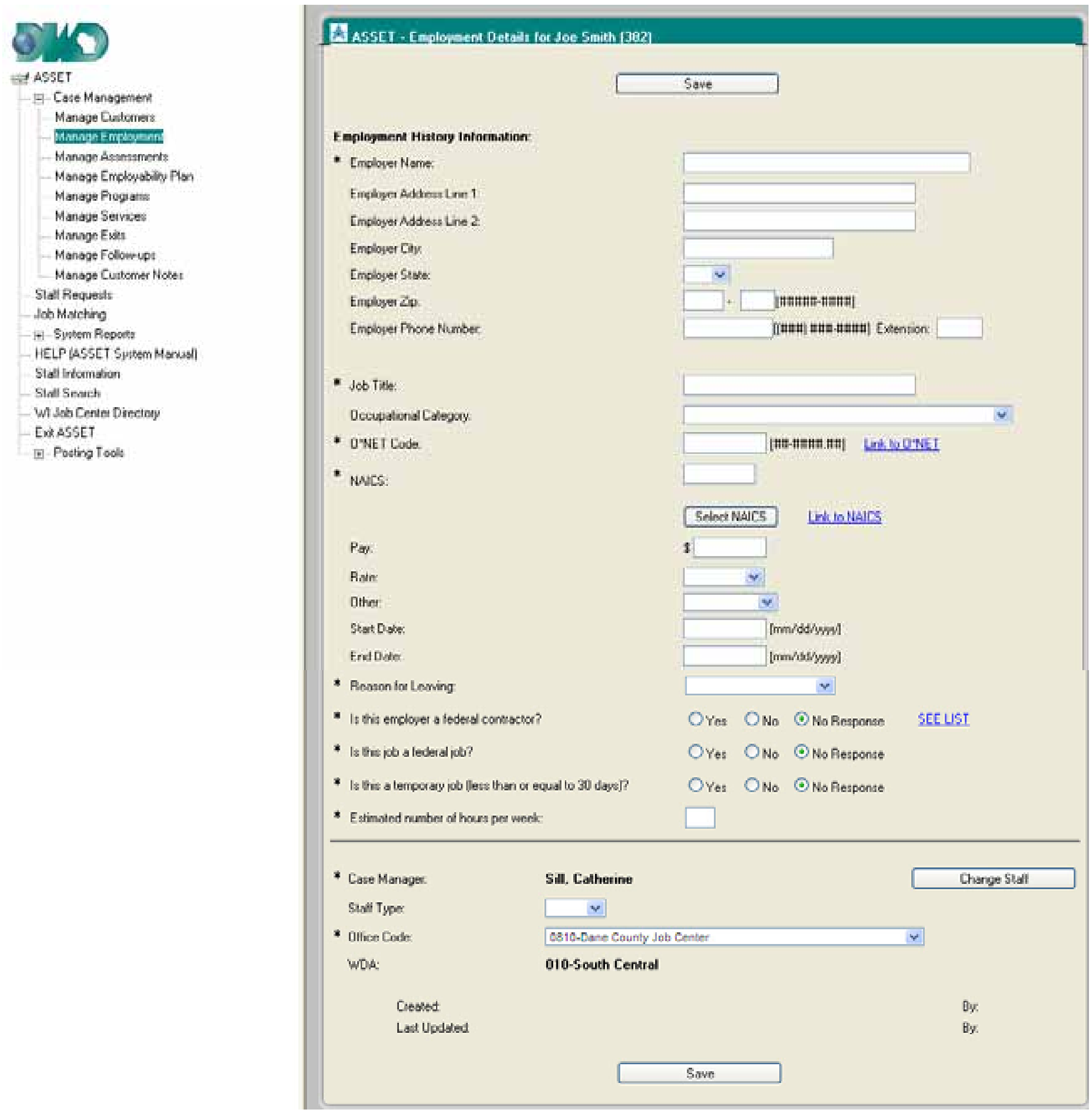
3. Is this a temporary job (less than or equal to 30 days)?
   Check "Yes," is this job is **expected** to last $\leq$ 30 days.

4. Estimated number of hours per week:
   Put the actual or estimated number of work hours per week that this customer had (or will have) on this job.

ASSET CASE MANAGEMENT FUNCTION

3-3 ____MANAGE EMPLOYMENT____

Clicking on the Add Job button displays the following screen:



ASSET CASE MANAGEMENT FUNCTION

3-3 ____MANAGE EMPLOYMENT____

The field definitions for this page are:

FIELD	REQUIRED	DESCRIPTION
• **Employer Name**	Yes	Text field for the name of the employer or company. Be as complete and accurate as possible to avoid potential confusion
• **Employer Address 1 & 2**	No	Text field for the Employer mailing address
• **Employer City**	No	Text field for the City of Employer Location
• **Employer State**	No	Drop down menu item. State in which the Employer is located
• **Employer Zip**	No	Text field – Zip Code of Employer
• **Employer Phone Number**	No	Text field –Telephone Number for Employer
• **Job Title**	Yes	Title of job performed by the individual at the employment site.
• **Occupational Category**	No	Occupational category that is used to classify occupations based on the Job Title.
• **O*Net Code (Number)**	Yes	The O*NET code is system generated once the occupational category is selected. A worker can use the Link to O'NET to access additional codes if preferred.
• **NAICS**	Yes	The NAICS code is system generated if a code is selected from the pop up box that appears when the worker presses the Select NAICS button. The NAICS code can also be manually entered by the worker, if known.
• **Link to NAICs**	No	Link to the North American Industry Classification System web-site
• **Pay**	No	Text field to enter the wage for this job.

ASSET CASE MANAGEMENT FUNCTION

3-3 ____MANAGE EMPLOYMENT____

FIELD	REQUIRED	DESCRIPTION
• **Rate**	No	What the pay was based on e.g., per hour/day/week/month/year
• **Other**	No	If paid other, workers should attempt to factor an hourly rate based on salary, commissions, in-kind wages, Per Day
• **Start and End Date**	No	Date the job began and ended
• **Reason for Leaving**	Yes	Circumstances why the employment ended
• **Federal Employer ID**	Yes	Employer is listed on the Federal Contractor Job Listing (FCJL)
• **Federal Job Information**	Yes	Employment is a Federal Government Job
• **Temporary Job**	Yes	Will the job be less than or equal to 30 days
• **Estimated Hours per Week**	Yes	Actual or estimated number of work hours per week the customer had on the job
• **Case Manager**	Yes	Staff who is working with the individual
• **Office Number & WDA**	Yes	Office Number(s) where Case Manager works and Workforce Development Area associated with that office
• **By Block**	System Automated	Date Data was keyed into ASSET and Date of information change

Return to Index Click Here

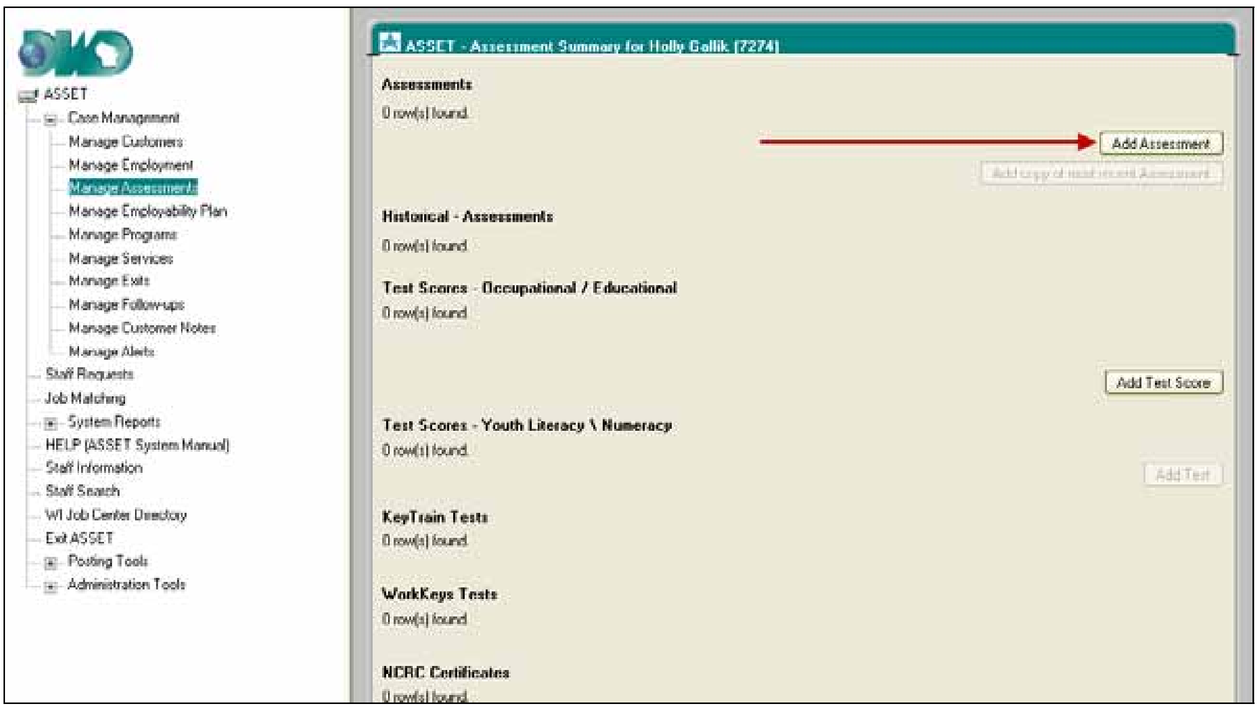
Users' Guide

ASSET CASE MANAGEMENT FUNCTION

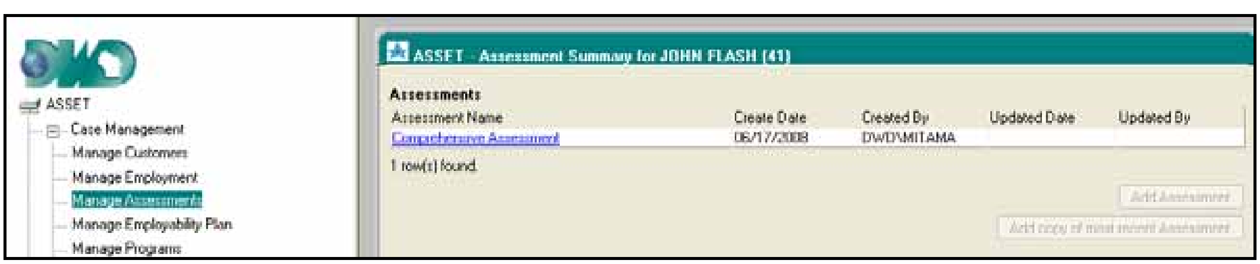
3-4 ____MANAGE ASSESSMENTS____

Assessments

Manage Assessment is the case management function that provides workers with an area to record their customer assessment information. There are 7 distinct areas to the Assessment Summary page. Click on Manage Assessment located on the ASSET Menu Tree. This launches the Manage Assessment Summary page. If a current assessment isn't present in ASSET the Add Assessment button will be available.



If a Comprehensive Assessment is present, the page displayed looks like the one below. Note that the Add Assessment and Add copy of most recent Assessment buttons are no longer available to the user.

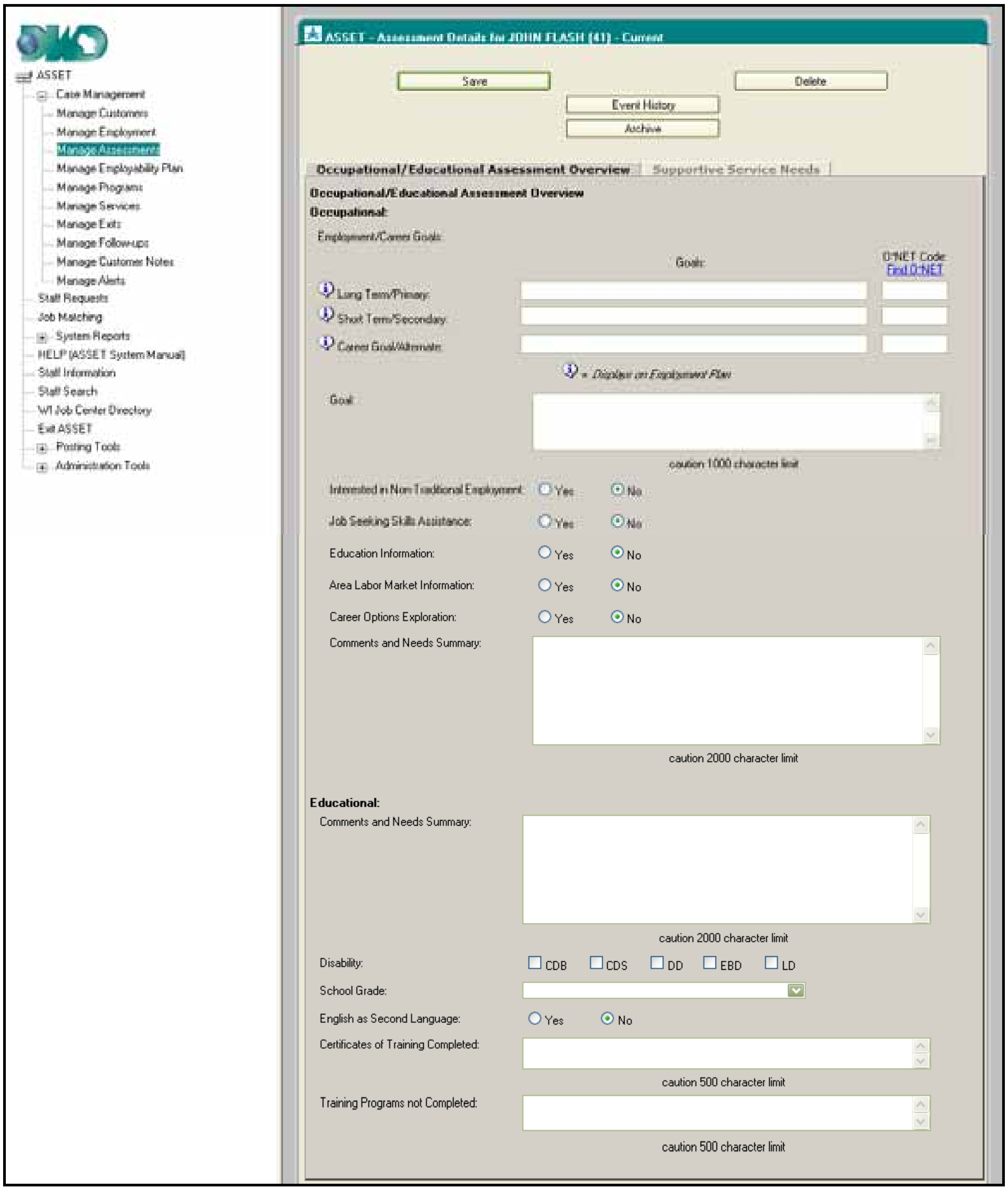


ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

To record participant assessment information, click on the link for the Comprehensive Assessment, which displays the following page:



Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

Workers should create a new Comprehensive Assessment only if the customer has been inactive for a long period of time, or the person's situation has changed significantly, rendering the previous assessment inaccurate or obsolete. Staff should continually update the current Assessment so that it's a cumulative record of the customer's assessment information. It is not necessary to create a new Assessment for each program or program area in which a customer participates.

The structure of the Comprehensive Assessment page consists of the following two tabs.

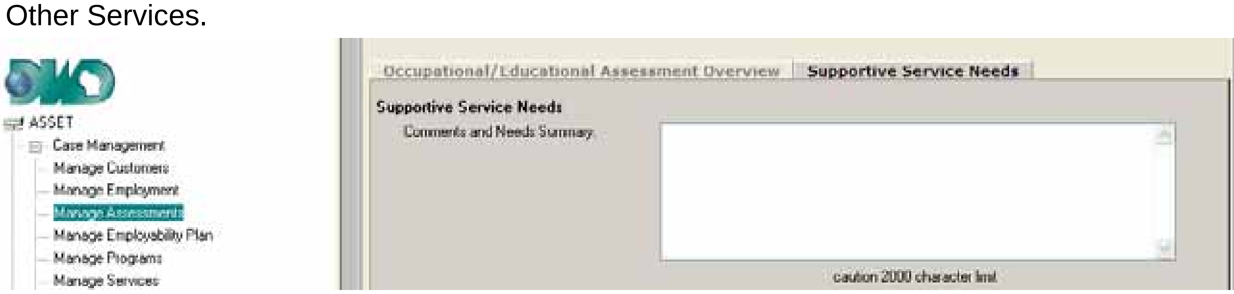
Occupational/Educational Assessment Overview Tab

The general information collected in this area is the worker's overall appraisal of the customer's employment needs and the employment goal the customer hopes to achieve. The Occupational portion of the screen consists of text boxes, radio buttons and data entry fields. There is an open text area (free format) where workers may comment and summarize needs not covered by the radio button topics. The radio buttons, which have a default value of No, may be toggled to the Yes response if the customer is in need of or interested in any of these items.

Employment/Career Goals: There are 3 fields for indicating the Primary, Secondary, and Alternate employment goals and the O*NET codes. The Small Icons indicate that data from this section will be displayed on the Employability Plan. Case Managers should identify the types of jobs for which the customer is looking, trained, or has experience. At least one Goal must be listed to create the Employability Plan.

Supportive Service Needs Tab

The information documented in this Assessment tab includes several topics that may have an impact on the employability of a customer. There is a text box for a summary statement regarding Supportive Service Needs, then various fields, text boxes, and check boxes within each topic. The choices are Child Care, Transportation, Housing, Medical, Disability, Legal, and Other Services.

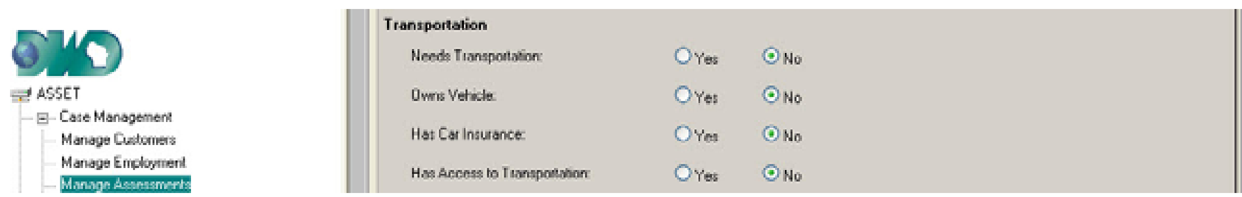


ASSET CASE MANAGEMENT FUNCTION

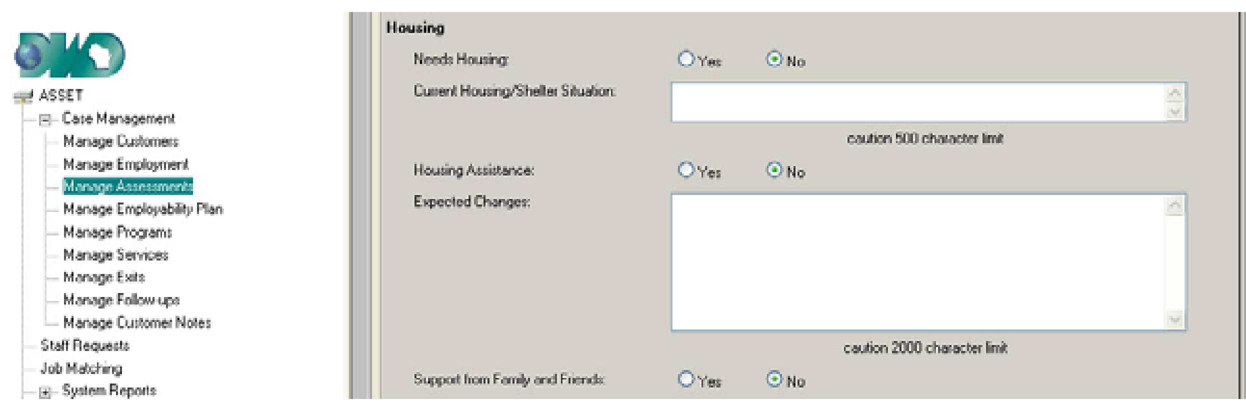
3-4 ____MANAGE ASSESSMENTS____

Child Care section:
Workers may indicate whether the customer has need of child care services and the type of arrangements needed or made. Workers should document here if the customer is receiving Child Care assistance through TANF or other source.

Transportation section:
Workers respond with a Yes/No radio button to describe the customer's transportation situation.



Housing section:
Workers may document the customer's need for housing assistance, homelessness, or other related situation that may impact employability.

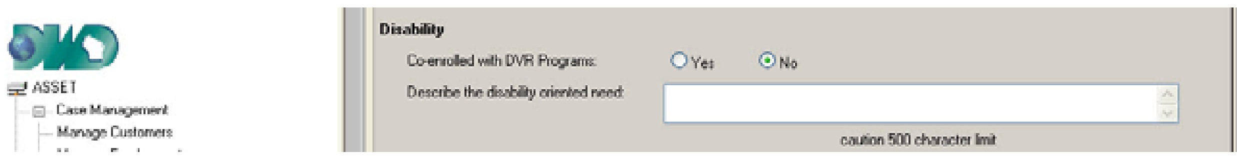


Medical section:
Workers document whether the customer has health and dental insurance in this section.

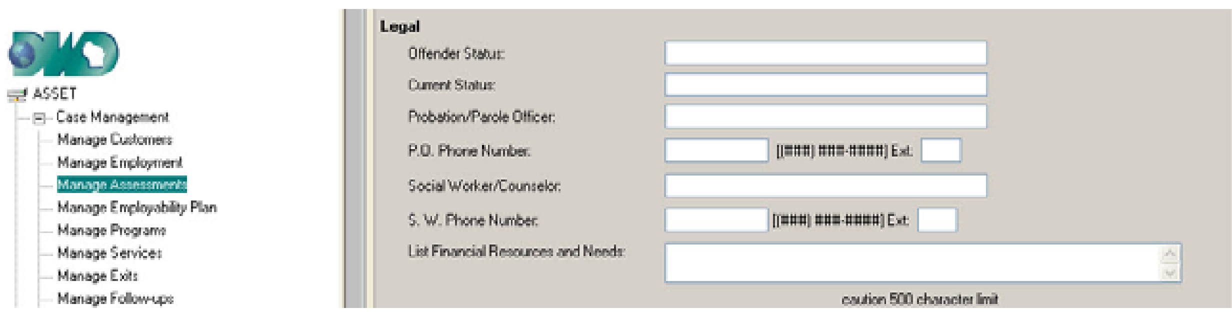
ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

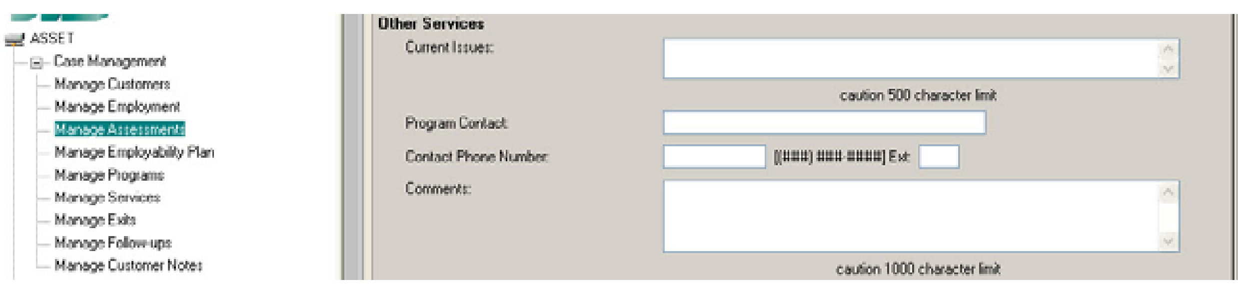
Disability section:
Workers indicate if the person is working with the Division of Vocational Rehabilitation and other information about a disability that impacts employability.



Legal section:
Workers may indicate offender status as well as the contacts with Probation and Parole or Social Services connected to this status.



Other Services section:
Workers may document the specific service and related contact information for other types of supportive services not covered elsewhere. An example might be a food pantry or clothing exchange.



ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

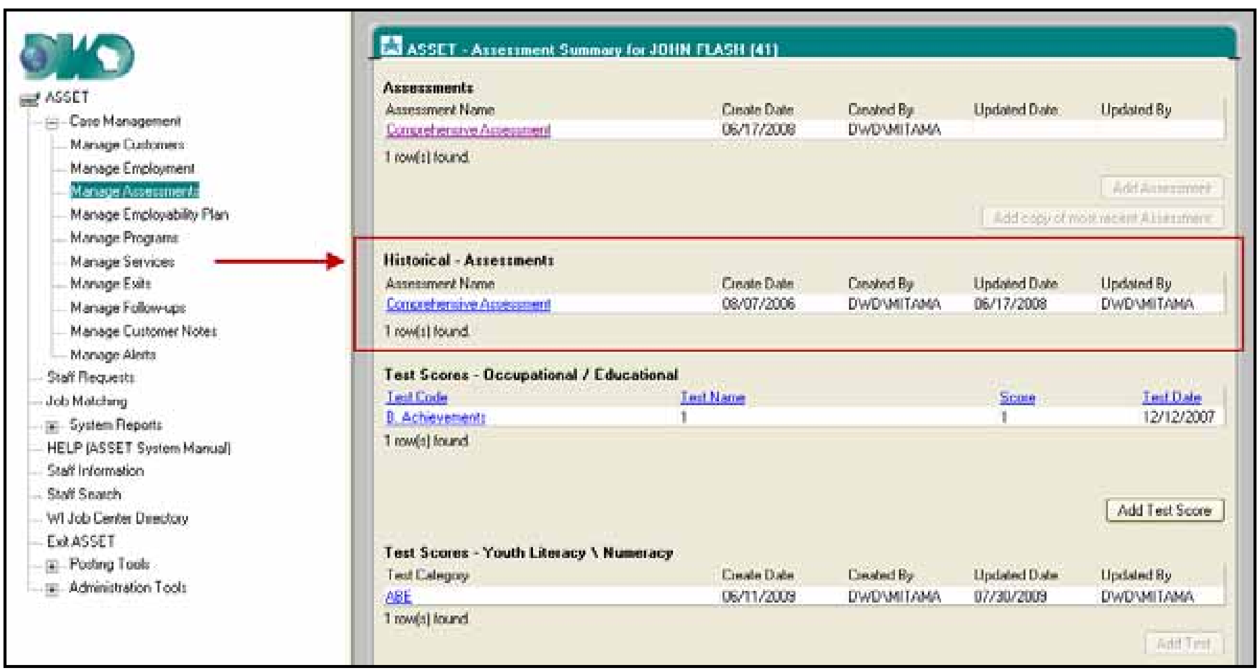
Historical Assessments

Once exited, the Comprehensive Assessment is archived (via system automation) and is viewable, but no longer updatable to staff. If a customer is re-enrolled staff will need to determine whether to "Add a copy of the most recent Assessment," or, to "Add Assessment," completing an entire new assessment.

As a general rule, if the participant has been inactive for a long period of time, or the person's situation has changed significantly, rendering the previous assessment inaccurate or obsolete, it is recommended that staff create a new Comprehensive Assessment. Click on the Add Assessment button to complete the Assessment.

If a customer was inactive for a short period of time, staff should update the previous assessment. To update the assessment, click on the "Add a copy of the most recent Assessment" button.

Note: It is not necessary to create a new Assessment for each program or program area in which a customer participates.



If staff forget to add assessment information prior to the exit, the information can be added if the case manager submits a Staff Request for the assessment information to be added to the record by a JCS Administrator.

ASSET Users' Guide

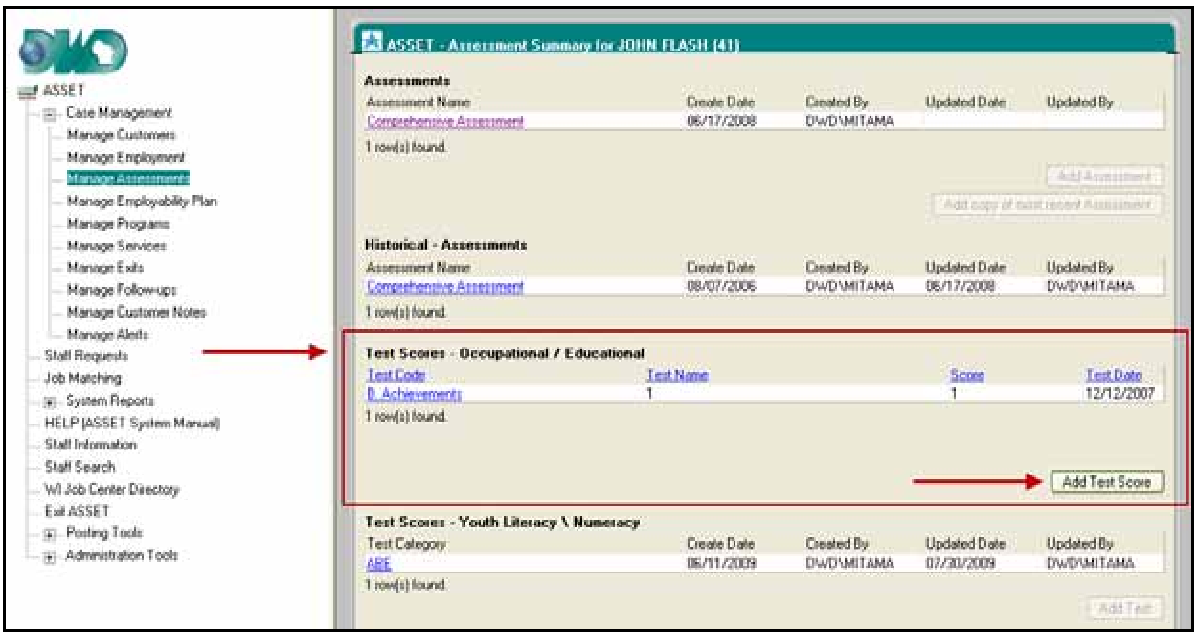
ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

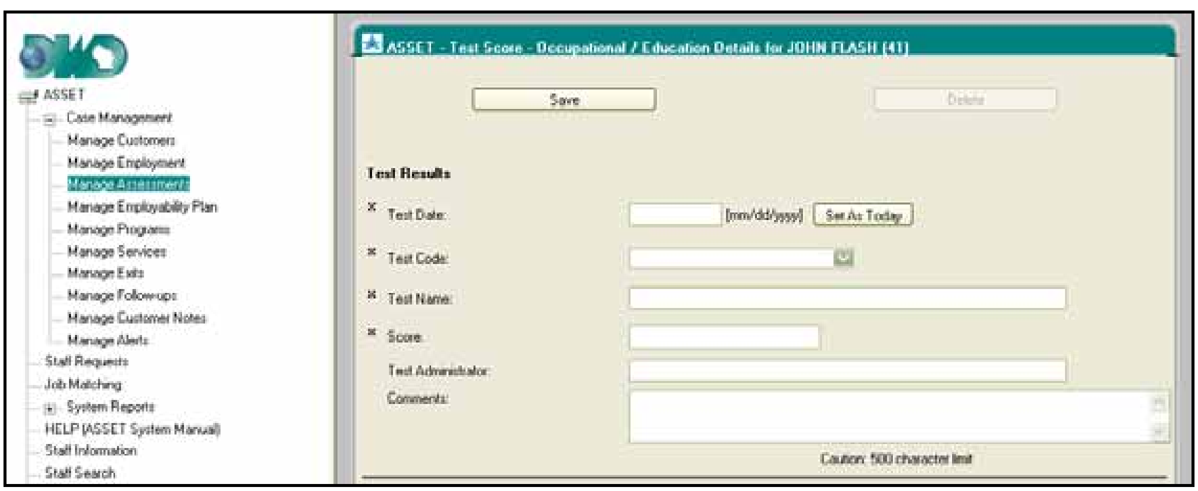
Test Scores - Occupational/Educational

Documented in this section is assessment information about the type of formal tests given to the customer. Each time a new test is administered, the worker may document the information related to that test.

Note: The information entered in the Educational Section is not used for Federal reports. It is used only for customer employability planning and assessment purposes.



To launch the Occupational/Educational Details page, click on the Add Test Score button.



ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

Following is a list of the types of test results that may be recorded:

- Aptitude
- Achievements
- BESI
- Career Development Inventories
- Interests
- Basic Math Skills
- Other Education Assessment Tools
- Proficiencies
- Basic Reading Skills

The Test Scores – Occupational Educational page requires a response in the following fields:

- Test Date
- Test Code
- Test Name
- Score (staff should include the numeric score and grade equivalent in the Comments area)

In addition, there are two optional entries (Test Administrator [Name] and Comments) that provide specific information about the test, e.g. observations, who gave the test, etc.. Once the information is entered, clicking save will return the user to the Assessment Summary page with the new test results displayed.

The Field Descriptions are:

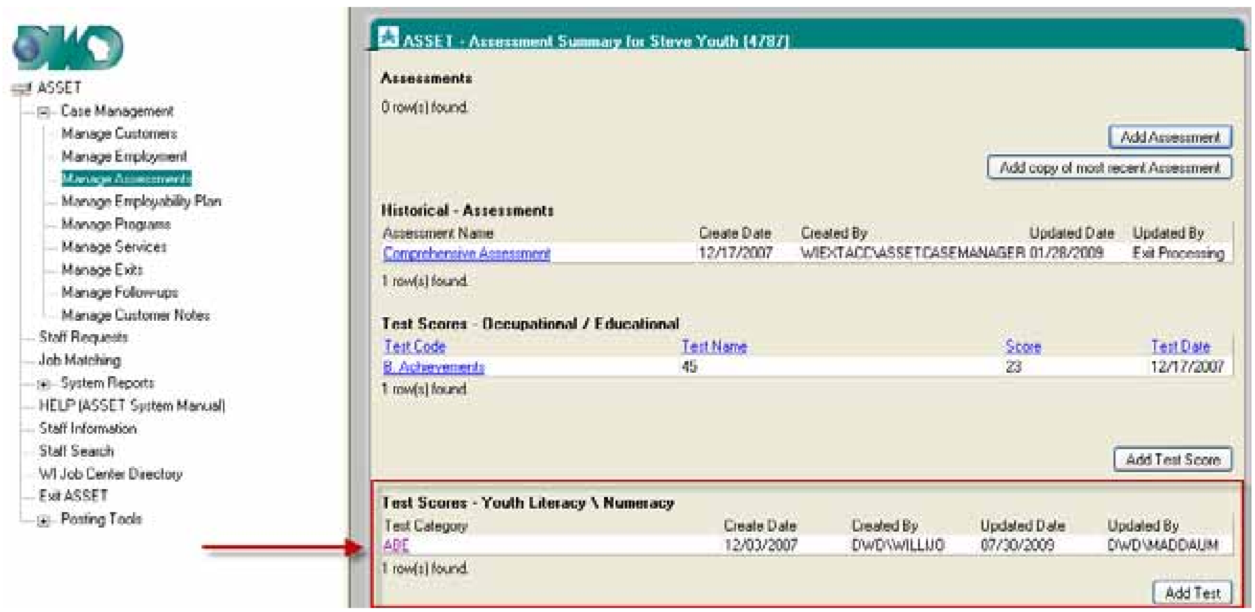
FIELD	REQUIRED	DESCRIPTION
Test Date	Yes	Date on which the test was administered.
Test Code	Yes	Test Code by Name/Battery.
Test Name	Yes	Text box in which the name of the test given is entered.
Score	Yes	Grade Level/raw score results from the test.
Test Administrator	No	Name of individual who administered the test.
Comments	No	Text box in which other pertinent information not captured elsewhere about the test can be entered.

ASSET CASE MANAGEMENT FUNCTION

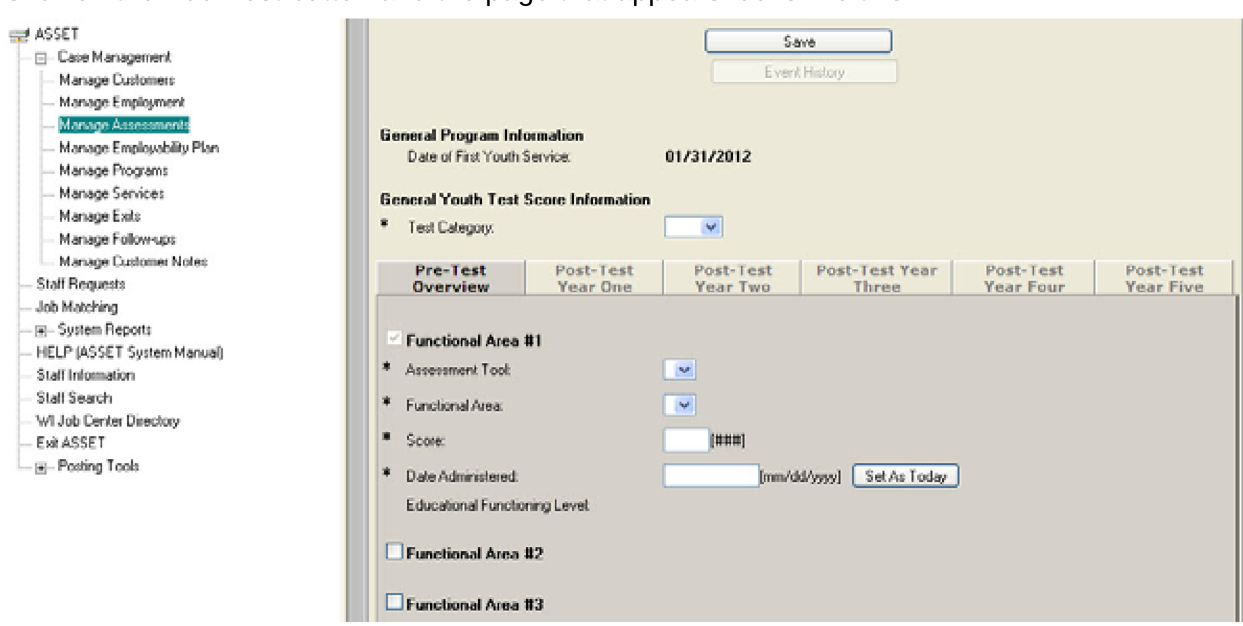
3-4 ____MANAGE ASSESSMENTS____

Test Scores - Youth Literacy/Numeracy

The Add Test button appears on the Assessment Summary page for an individual who has been identified as an Out of School youth who is Basic Skills Deficient. The Youth Program General Summary Page must also have an actual participation date present. The date field is populated when a service with an actual open date has been entered into ASSET and that service is beyond the Design Framework level.



Click on the Add Test button and the page that appears looks like this:



ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

When ESL is selected as the type of Test Category, the screen updates and looks like this:

The Field Descriptions are:

FIELD	REQUIRED	DESCRIPTION
Test Category	Yes	Select ESL (English as a Second Language) to indicate the test category type of approved test used for the assessment.
Functional Area #1	Yes	This is the functional area of the assessment test that was administered to the youth participant.
Assessment Tool	Yes	This field identifies the name of the test the participant was given. The test names vary as they relate to the type of Test Category that was selected.
Functional Area	Yes	Describes the functional area of the assessment test that was given. The choices appearing in this field reflect the type of assessment tool selected.

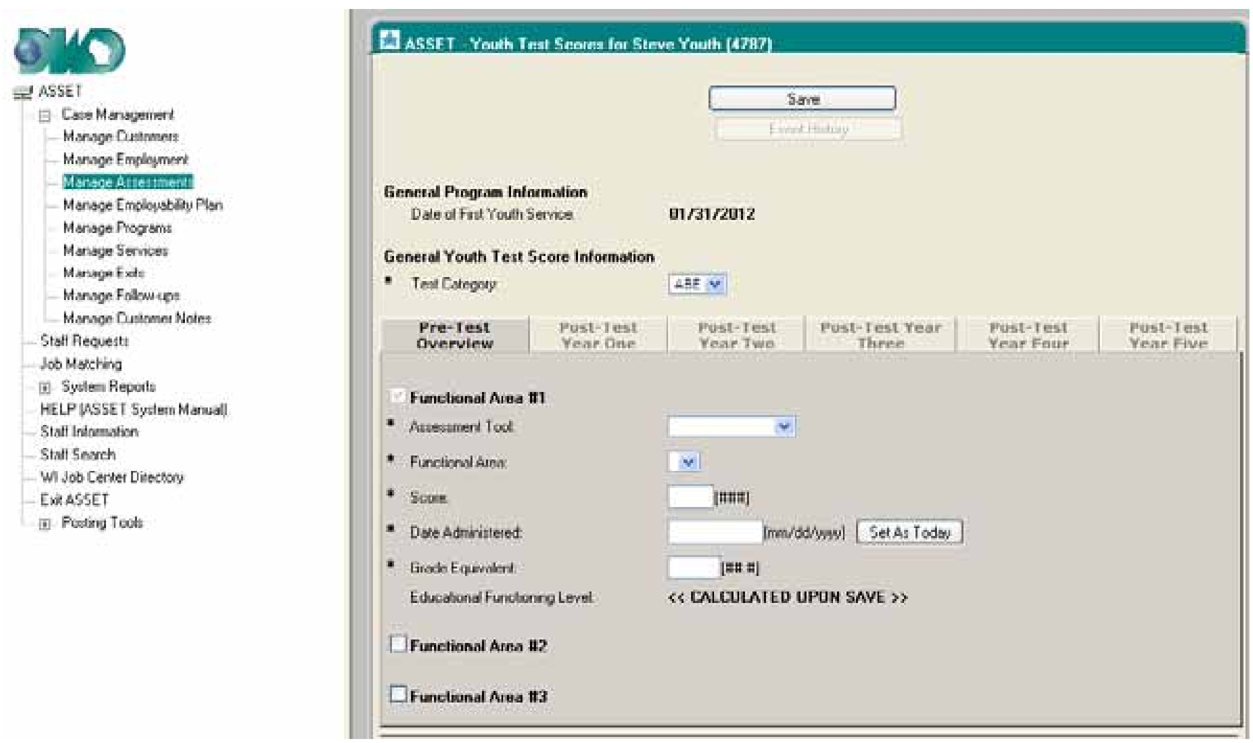
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

FIELD	REQUIRED	DESCRIPTION
Score	Yes	This is the Score resulting from the Functional Area test administered.
Date Administered	Yes	The date on which the participant was given the test.
Educational Functioning Level	System Generated	This field is the Educational Functioning Level associated with the youth participant's raw score. System calculated when responses are completed and the record is saved.

When ABE is selected as the type of Test Category, the screen updates and looks like this:



ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

The Field Descriptions are:

FIELD	REQUIRED	DESCRIPTION
Test Category	Yes	Select ABE (Adult Basic Education) to indicate the test category type of approved test used for the assessment.
Functional Area #1	Yes	This is the functional area of the assessment test that was administered to the youth participant.
Assessment Tool	Yes	This field identifies the name of the test the participant was given. The test names vary as they relate to the type of Test Category that was selected.
Functional Area	Yes	Describes the functional area of the assessment test that was given. The choices appearing in this field reflect the type of assessment tool selected.
Score	Yes	This field contains the Raw Scale Score Achieved by the youth participant on the pre-assessment test.
Date Administered	Yes	The date on which the participant was given the test.
Grade Equivalent	Yes	The equivalent grade level for a given score. The number range that is input is based on the Assessment Tool, Function Area, and Score.
Educational Functioning Level	System Generated	This field is the Educational Functioning Level associated with the youth participant's raw score. System calculated when responses are completed and the record is saved.

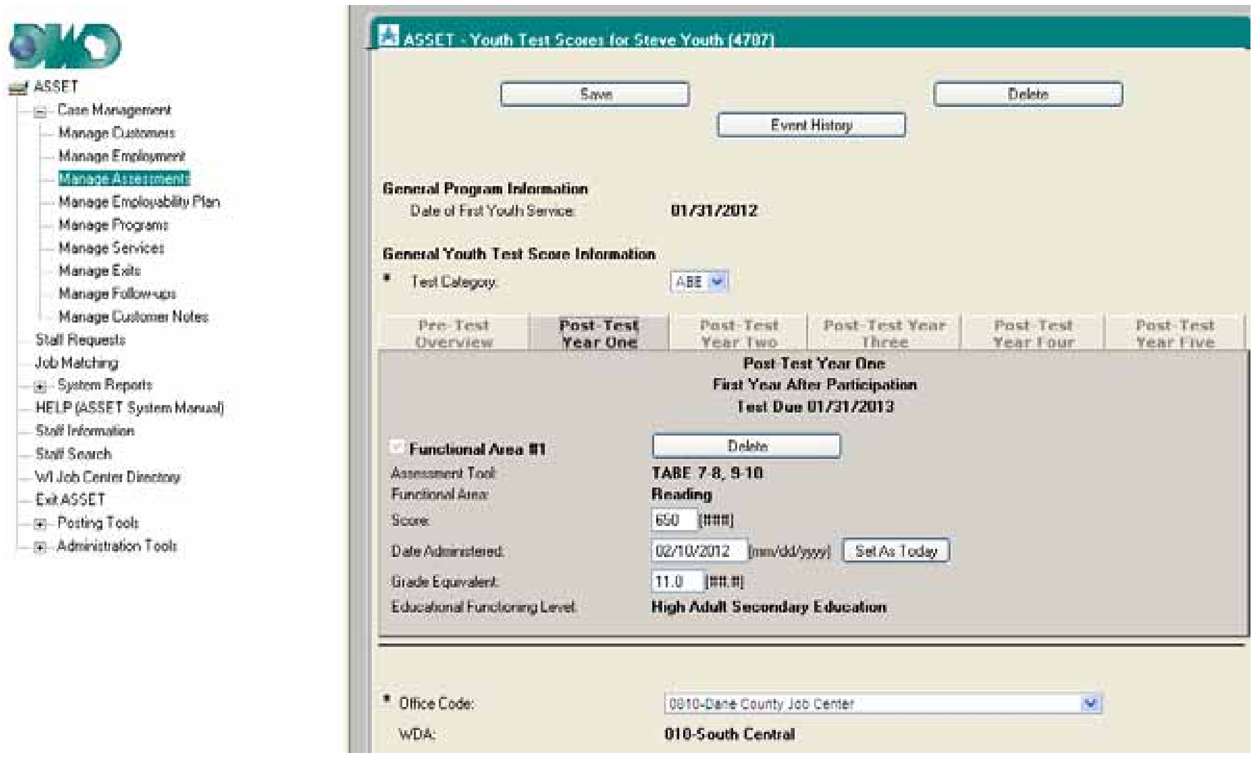
Post Test Tabs (5 Years)**:**

The Post Test Tabs should be used to record the date the post-test was administered to the youth during his/her first year of participation in the program. If multiple post-tests were administered, record the most recent date on which the functional area post-test was administered.

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

The Post Test tab looks like this:



The Field Descriptions Are:

FIELD	REQUIRED	DESCRIPTION
Test Category	Yes	Name of Test Category type of approved test used for the assessment.
Assessment Tool	System Generated	Identifies the name of the test that participant was given.
Functional Area	System Generated	Describes the functional area of the assessment test that was given.
Score	Yes	This field contains the Raw Scale Score Achieved by the youth participant on the post-assessment test.

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

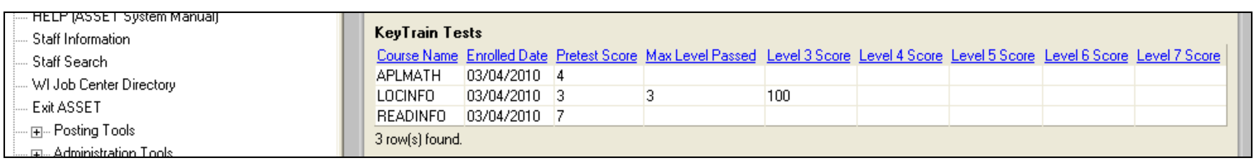
FIELD	REQUIRED	DESCRIPTION
Date Administered	Yes	The date on which the participant was given the post-test.
Grade Equivalent	Yes	The equivalent grade level for a given score. The number range that is input is based on the Assessment Tool, Function Area, and Score.
Educational Functioning Level	System Generated	This field is the Educational Functioning Level associated with the youth participant's raw score. System calculated when responses are completed and the record is saved.

In the ASSET case management function, the By Block located at the bottom of each tab is common to all. It shows information about who created the Assessment, who last updated, and transfers from tab to tab.

Printing a copy of the Assessment:
The tabular format of the Assessment requires a special process for printing. See Chapter 2-1 Presentation of ASSET Information for complete instructions on printing for tabular formatted pages.

KeyTrain Tests

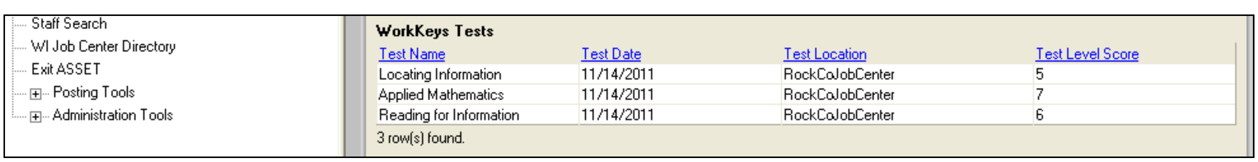
The KeyTrain Tests area is read only. KeyTrain test scores are uploaded weekly to ASSET.



Course Name	Enrolled Date	Pretest Score	Max Level Passed	Level 3 Score	Level 4 Score	Level 5 Score	Level 6 Score	Level 7 Score
APLMATH	03/04/2010	4						
LOCINFO	03/04/2010	3	3	100				
READINFO	03/04/2010	7						

WorkKeys Tests

The WorkKeys Tests area is read only. WorkKeys test scores are uploaded weekly to ASSET.



Test Name	Test Date	Test Location	Test Level Score
Locating Information	11/14/2011	RockCoJobCenter	5
Applied Mathematics	11/14/2011	RockCoJobCenter	7
Reading for Information	11/14/2011	RockCoJobCenter	6

ASSET CASE MANAGEMENT FUNCTION

3-4 ____MANAGE ASSESSMENTS____

NCRC Certificates

The NCRC Certificates area is read only. NCRC Certificate information is uploaded weekly to ASSET.

NCRC Certificates

Certificate Number	Certificate Level	Certificate Issue Date
KR13QQ3XBDPV	Gold	11/16/2011

1 row(s) found.

Return to Index – Click here

ASSET Users’ Guide

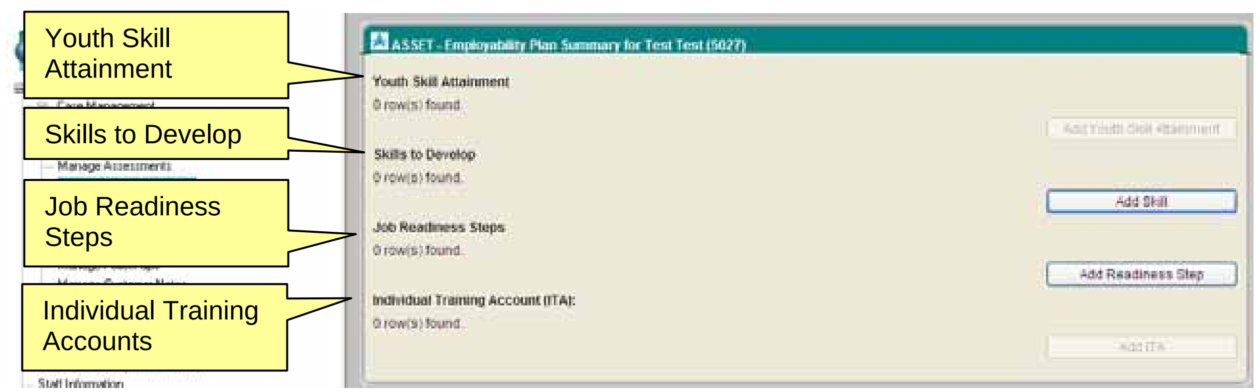
ASSET CASE MANAGEMENT FUNCTION

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:



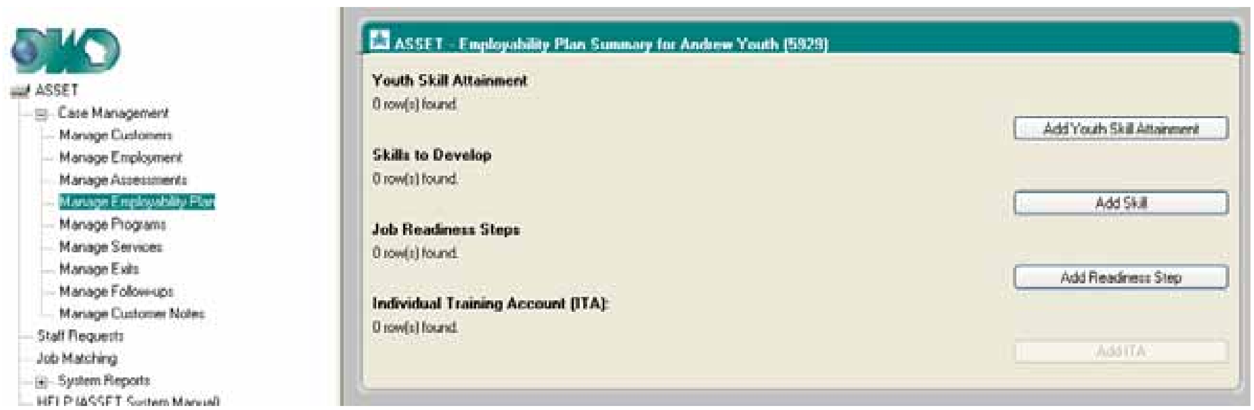
Users' Guide

ASSET CASE MANAGEMENT FUNCTION

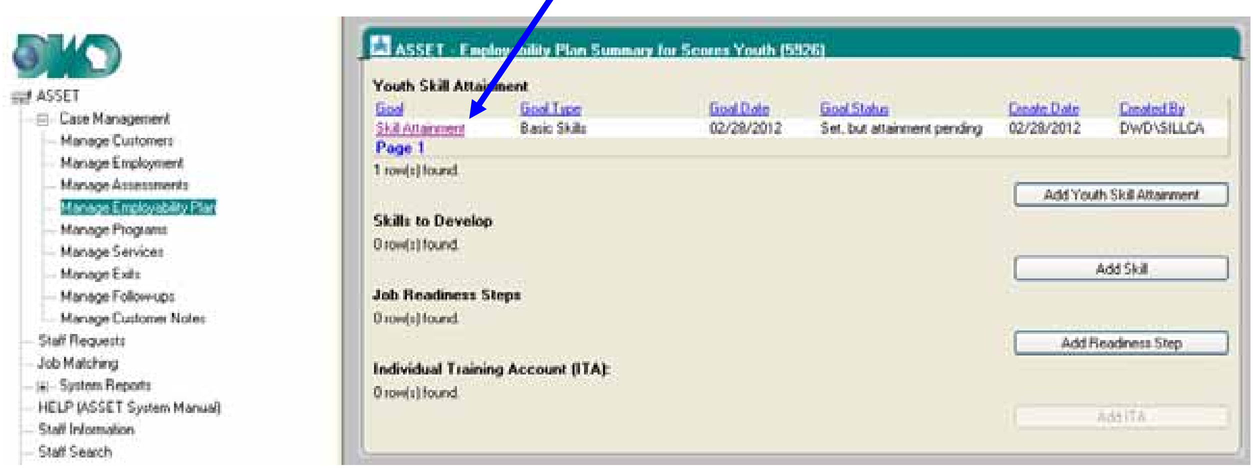
3-5 ____MANAGE EMPLOYABILITY PLANS____

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.



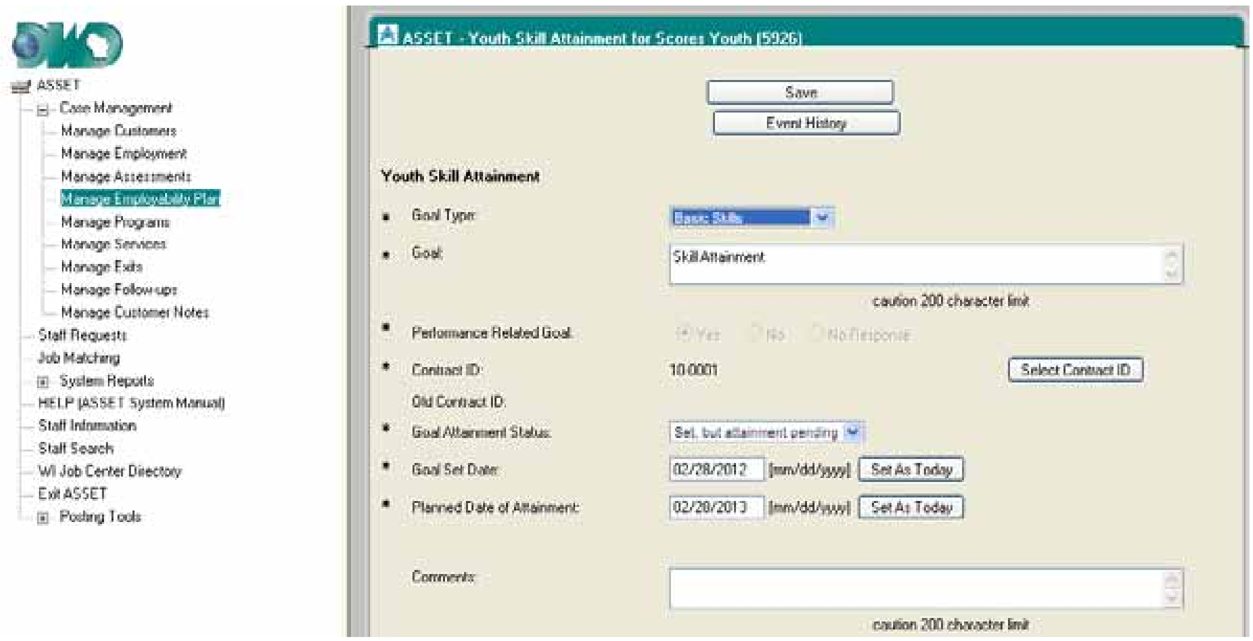
Case Managers may set as many skill attainment goals as necessary and then identify the ones they want counted for performance measurement purposes. Once a response is selected and saved, changes can only be made by an Administrative Staff at the Central Office.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

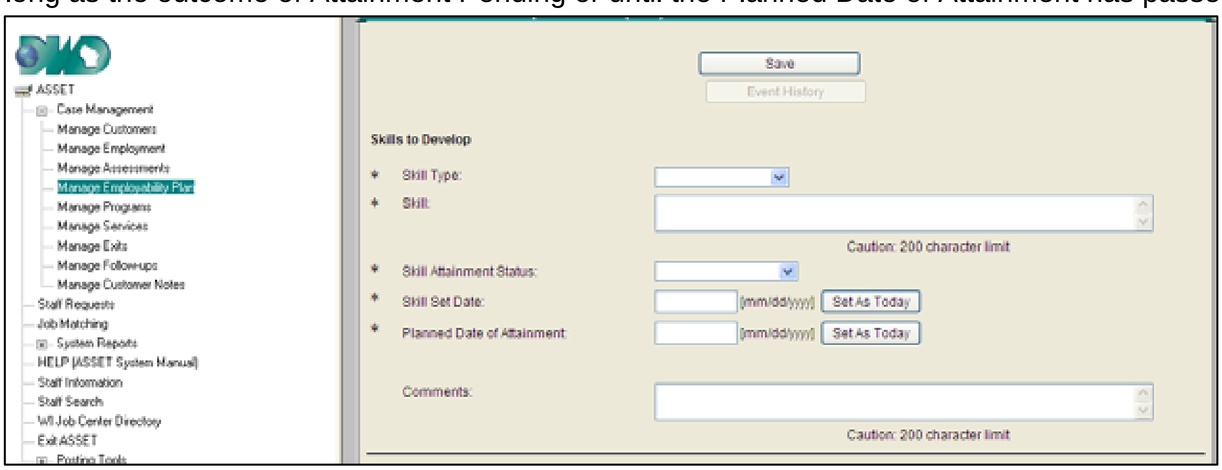
Skills to Develop
This function is where the case manager identifies the skills needed to find employment. They include educational as well as "soft skill" goals.

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.



ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

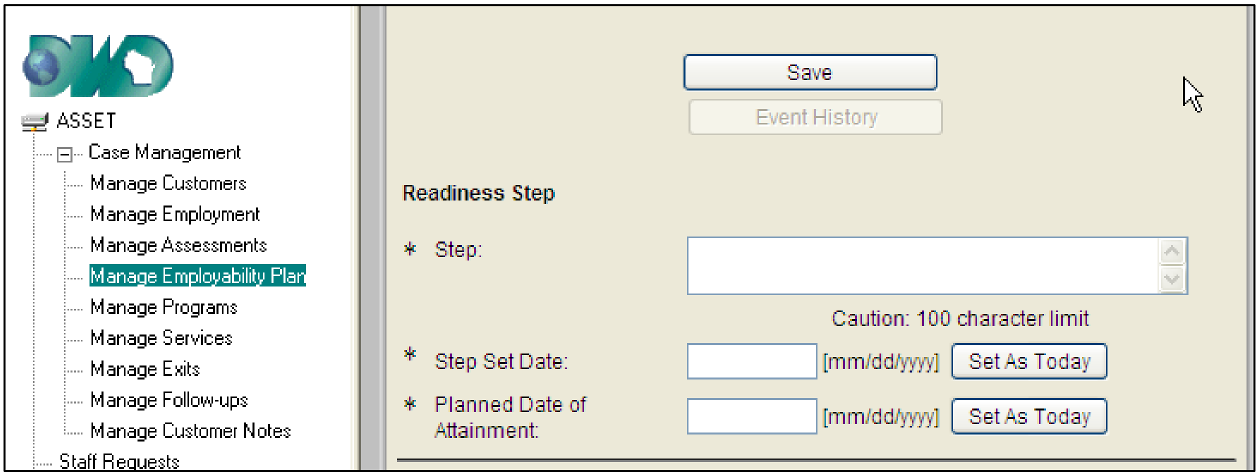
Readiness Step
The third function is the **Add Job Readiness Step**. This section is used for listing other activities or actions the customer needs to take to prepare for employment. These steps are outside of program participation but address needs which should be considered by the customer. This could 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.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

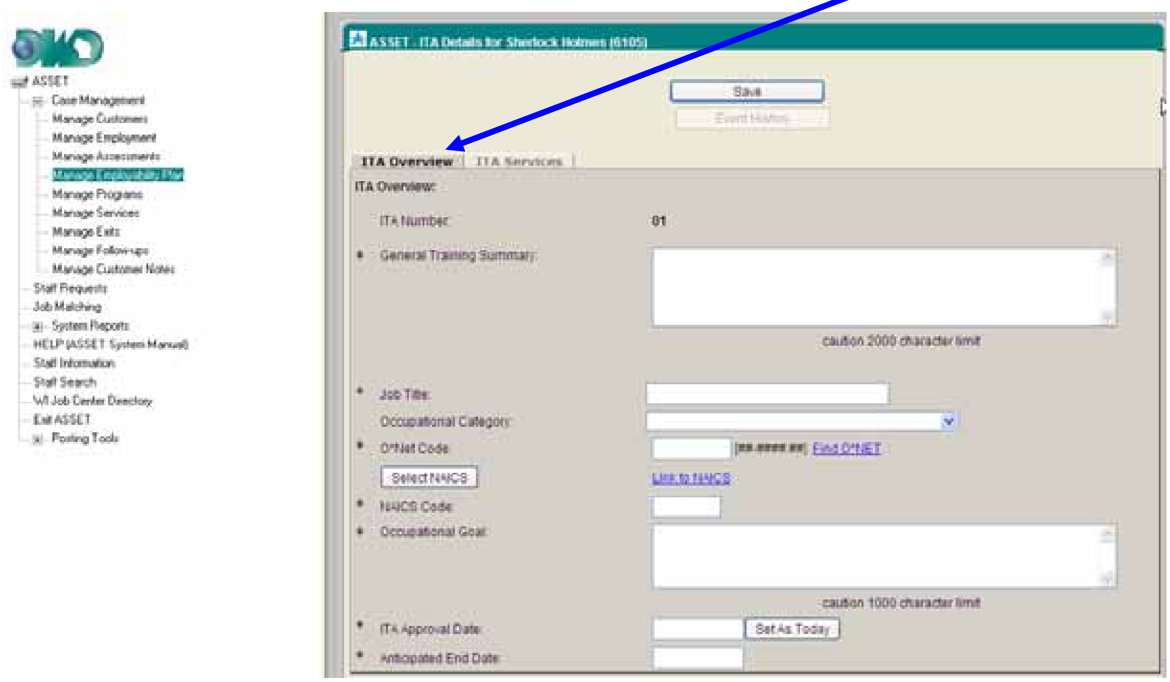
ITA tracking in ASSET provides WDBs with management information about ITA services through the Job Center Systems Data Warehouse. The functionality can assist in local and state monitoring of ITA participation by our customers.

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.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

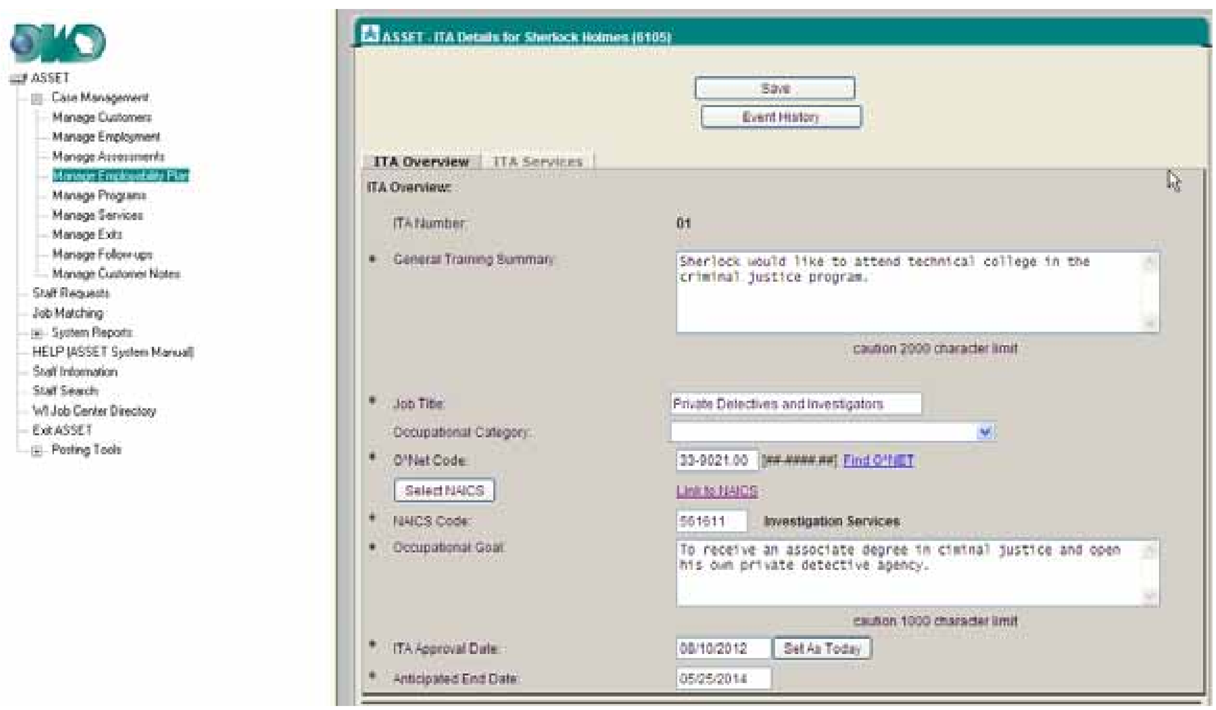
ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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:

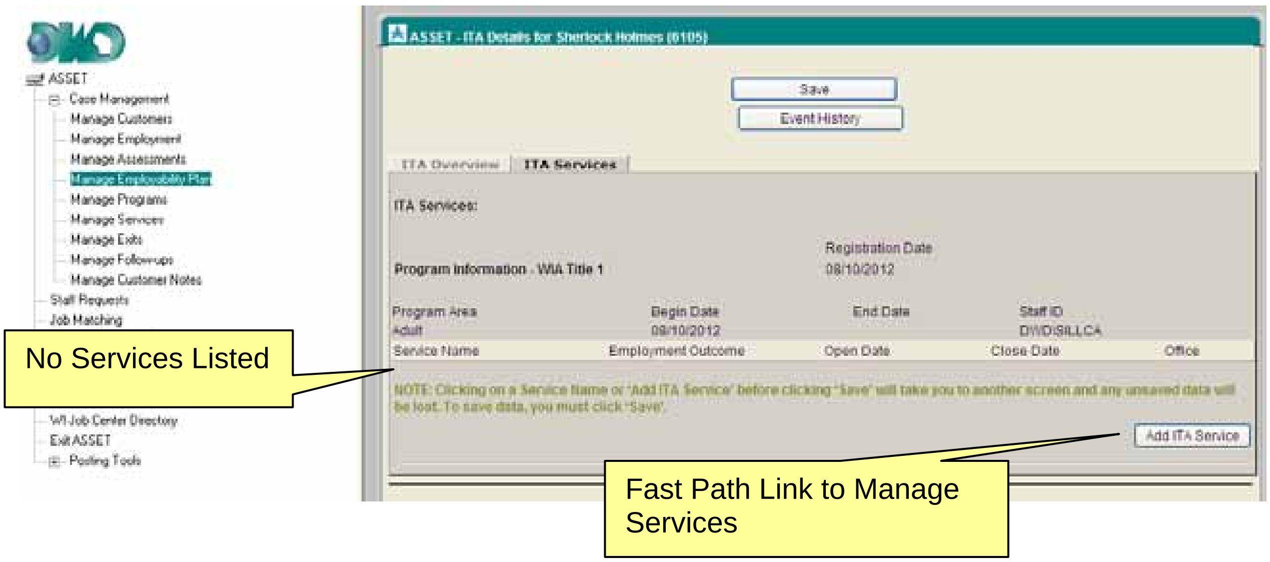


ITA Services Page:
The ITA Services page is a display of information about the specific training program funded under the ITA. The information on this page is the same information as in Manage Services once the Training Service is connected to the ITA Number established on the ITA Overview page. (It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

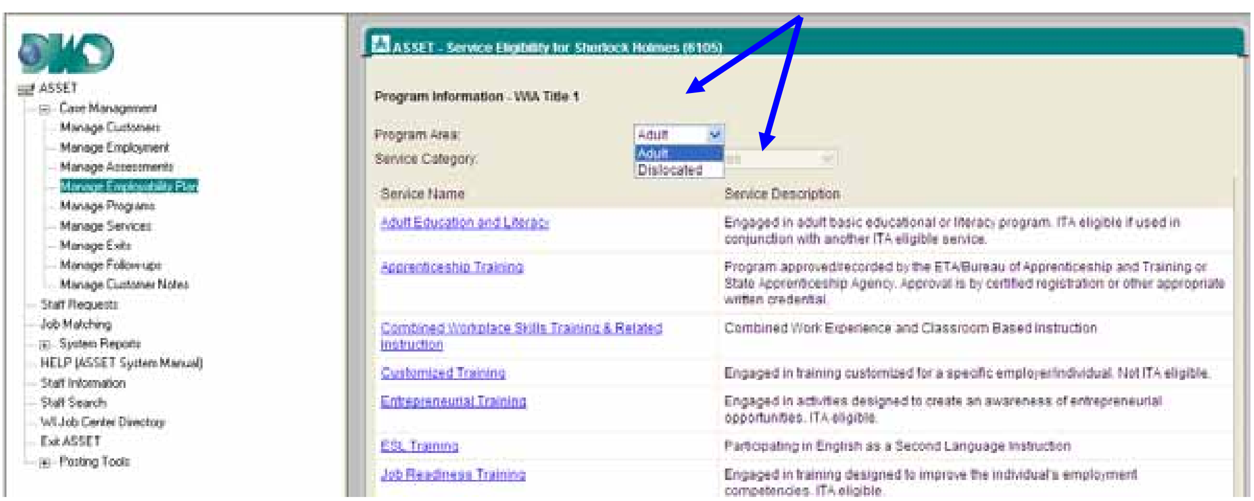
ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

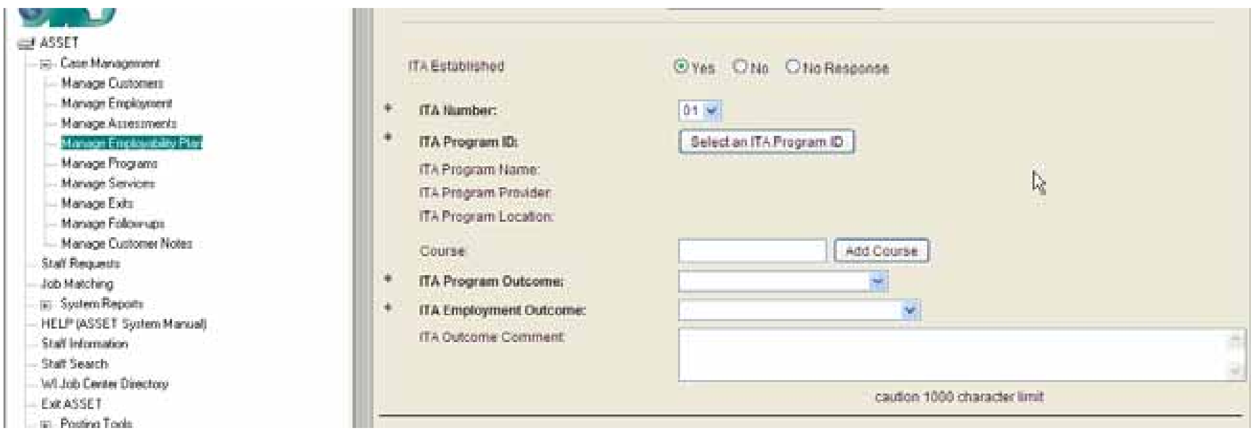


When the "Add ITA Service" link is used, the worker is taken directly to the Service Eligibility page – and the service category of Training is already selected. Note: Customers with both Adult and Dislocated Worker program area will have to select which Program Area is funding the ITA from the dropdown,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

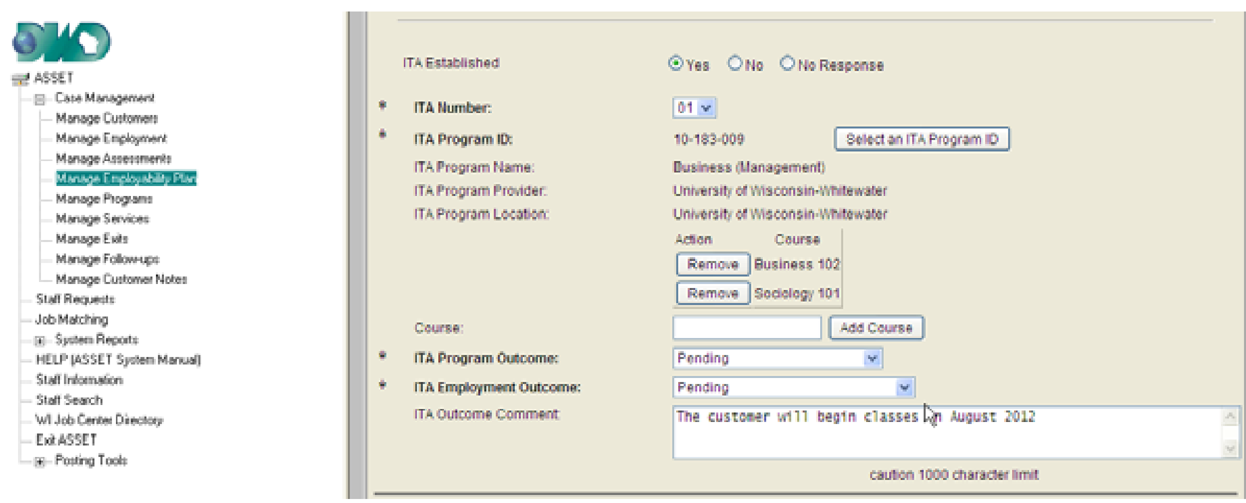


The worker must then select the appropriate Training Service for the ITA. The definition of each training service has been modified to indicate if that particular service is eligible to be covered by an ITA. Only those services appear in the list when coming to Manage Services via the ITA Link. When 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.



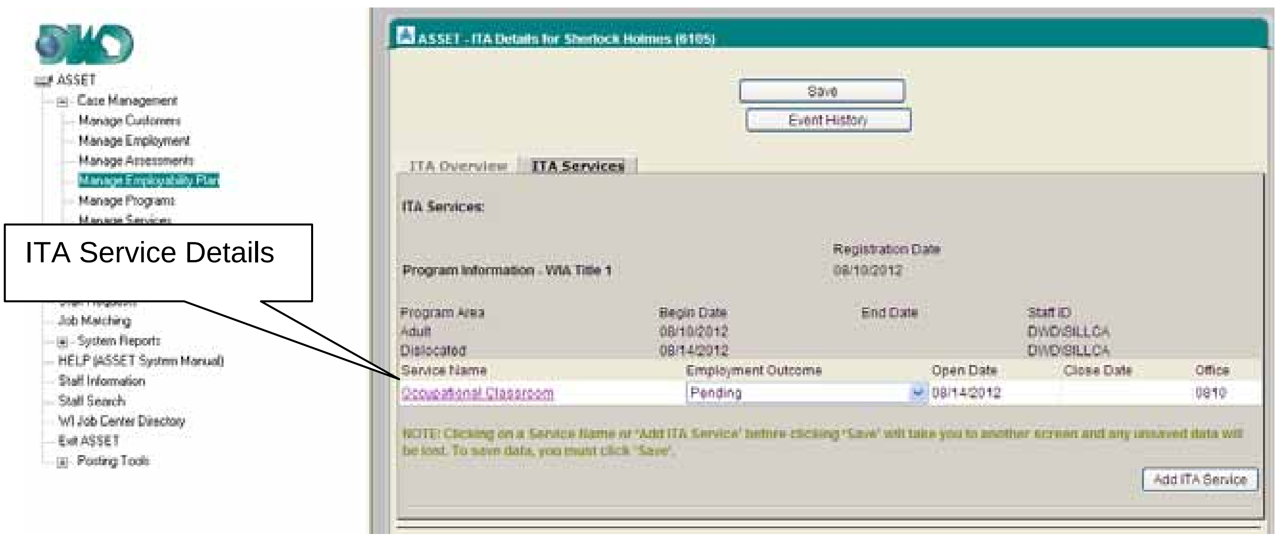
This is how the Manage Service page looks with the above items completed:



ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.**

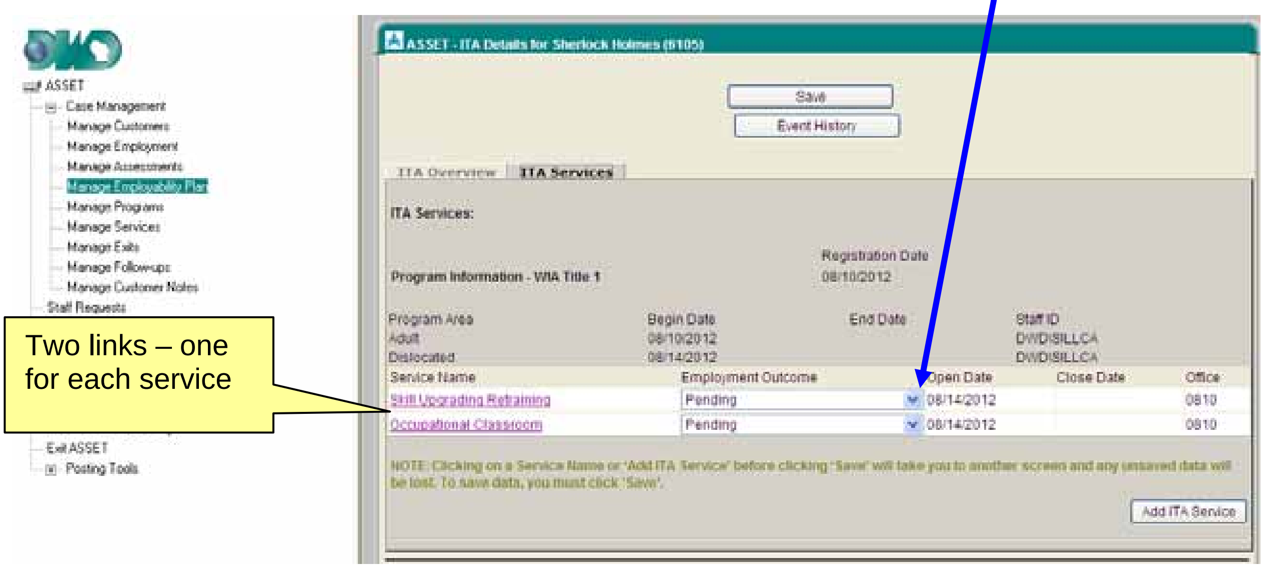
In the example displayed on the next page, a single ITA is funding two different training programs. Each one is shown as a separate service. In this situation, one training program is Entrepreneurial Training and the other is Occupational Classroom, although both might have been the same service type.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

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

ASSET CASE MANAGEMENT FUNCTION

3-5 ____MANAGE EMPLOYABILITY PLANS____

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.

Return to Index – Click here

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

This ASSET function has three major roles in the Case Management of the customer:

1. **Program Registration** - The primary focus is to register customers in the programs supported by ASSET. Although the creation of a Customer Record automatically creates a Wagner-Peyser (W-P) registration, Title 3 W-P workers need to check the Manage Program screens for accuracy and to add information about participation in special programs such as Veterans Services, Migrant and Seasonal Farm Workers (MSFW) services, etc.

   For the other programs, Trade Adjustment Act (TAA) and Workforce Investment Act (WIA) Title 1B, it is required that a worker create a program registration record using the Manage Programs function before the customer is counted as being registered in that program.

2. **Program Area Begin** – The Manage Programs function is used to start the episode of WIA Title 1 Program Area (Adult, Dislocated Worker and Youth) participation within the WIA Title 1 Program registration period. ASSET design at the Program and Program Area levels allow for internal editing to ensure that customers are retained in the Program while moving in and out of Program Areas or having concurrent participation in more than one Program Area.

3. **Program Area End** – The Manage Program function is used to complete a customer's episode of participation in one of the WIA Title 1 Program Areas. An individual's episode of participation in one Program Area may end, while continuing in others. A person will not be allowed to exit from the WIA Title 1 Program until all Program Areas have ended.

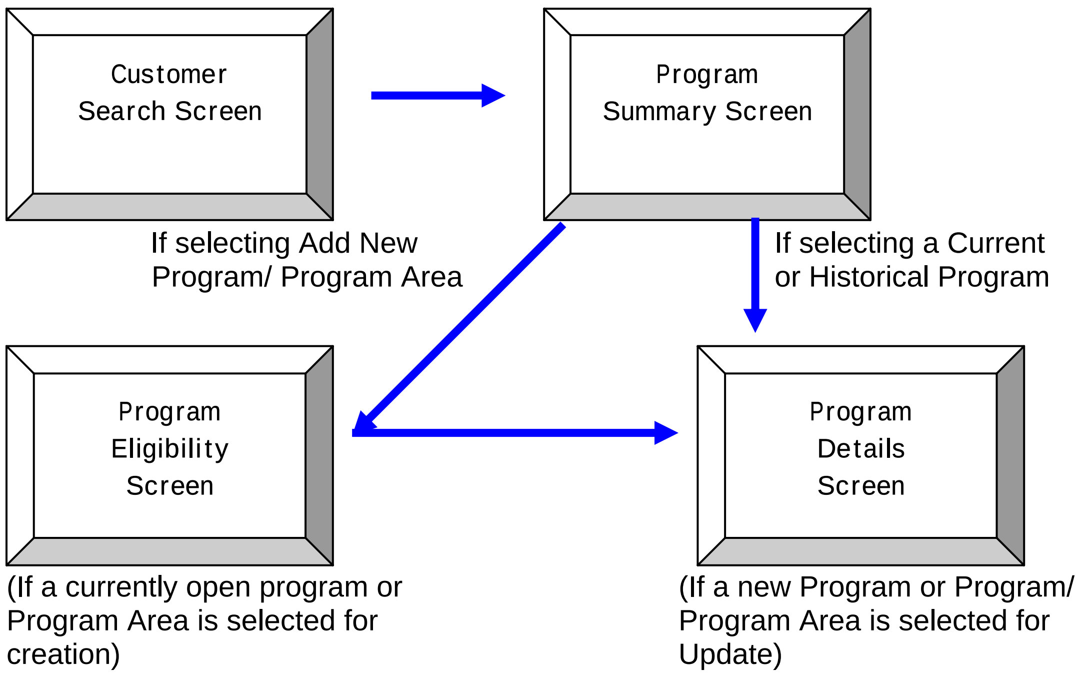
Purpose:
The purpose of the Manage Program function is to capture the program-specific data that is not part of the Customer Record. For example, TAA requires data about the TAA petition number that is not needed elsewhere. For the WIA Title 1B program, some data is collected at the Program level (WIA Adult, Dislocated Worker, or Youth). **The system requires completion of the WIA Title 1B Program Registration information before any Program Area is opened.** See Organization of Program Information for a discussion of the difference between Program and Program Area.

The Manage Program function stores data programmatically. Any information entered for the TAA program remains unchanged, even though the same data element might be later entered for one of the WIA Title 1B Program Areas. For example, each program will have its own Program Case Manager stored separately. Additionally, because the WIA Title 1B program has three Program Areas (Adult, Dislocated Worker & Youth), data that must be segregated to each of these Programs Areas is captured and stored accordingly.

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

Manage Programs Screen Flow:
This is the flow of screens within this function:



Customer Search Page:
When the worker clicks on the Manage Program function in the Menu Tree, the Customer Search page opens. If the customer is among those listed in the Previously Searched for Customer area, that customer may be selected by clicking on the person's underlined PIN link. Otherwise the worker must do the search to find the correct customer. If a customer record does not exist in ASSET, the worker must return to the Manage Customer function to create the Customer Record.

Program Summary Page:
The program summary page is divided into three sections – Currently Open Programs, Historical Exited Programs, and W3 – Wisconsin Workers Win Programs. Workers may select any of the Currently Open Programs/Program Areas in the list for review or update, or may select any of the Historical Exited Programs for review by clicking on the underlined link for that entry. This will immediately open the Program Details record for this program. However, **if the worker needs to open a new Program or if an additional Program Area is being opened under WIA Title 1B, the worker must click the Add Program/Program Area button.**

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

The Wisconsin Workers Win Program (W3) is a pilot training program currently offered in 3 workforce development areas (WDA). The W3-Wisconsin Workers Win Programs area is used by workers in the select WDAs to record information on the W3 program.

Program Eligibility Page:
The Program Eligibility page displays those Programs that may be selected for new registration based on Programs that are currently open. This page also will display if a new Program Area may be opened under an existing WIA Title 1B Registration. Note: There is logic built into ASSET that checks the date of birth of a customer so that a person age 22 or older will not be allowed to become a WIA Youth.

Program Details Pages:
The Program Details pages are built dynamically in a tabular format, depending on the Program being requested.

- **From the Historical Exited Programs**: The page will be the Program and Program Area requested. These pages are not updateable. The worker will get an error message if a change to any data is attempted.

- **From Currently Opened Programs:** If requesting to view an existing open Program, the Program Details page displayed will be for the Program or Program Area requested. Fields that may be updated are either blank or in black typeface. Fields that cannot be changed after initial submittal are in gray typeface.

- **From the Add a Program button**: The Program Details screen will include two tabs for WIA Title 3 (Wagner-Peyser) and four tabs for TAA. If the worker requested to create the first WIA Title 1 Registration, the worker will need to select the Program Area initially being created as well. This additional tab will be displayed.

  The tabs are described below:

TAB 1	TAB 2	TAB 3, 4, 5
	Title Data	**Program Area Data**
General Program Summary	Title 1	Adult, Dislocated Worker, or Youth
	Title 3	None for Title 3
	TAA	TAA Financial and TAA Additional Petitions

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

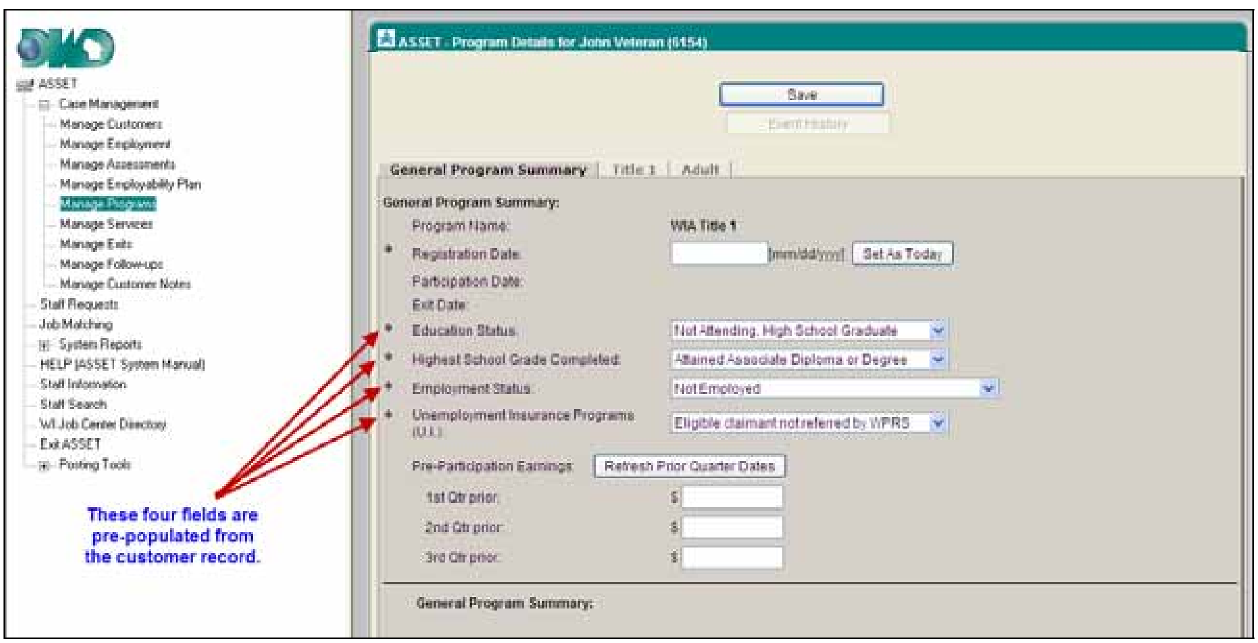
General Program Summary (Tab 1):

The data captured in this tab is relevant to the Program of registration. The items on this tab are the same for WIA Title 1 and Title 3 Programs, but the data is stored programmatically, separate from the same data elements under other Programs.

The Participation Date for the WIA Title I Adult, Youth, and Dislocated Workers, TAA, and Title 3 Wagner-Peyser is located on the appropriate Program Registration page on the General Program Summary tab. This field is system-populated when staff enters any service at the Core Self/Informational (Title 3) or Program Element level. The Service must have an Actual Begin (open) date and the funding source selected is for Adult, Youth, Dislocated Worker, TAA, or Wagner Peyser.

Note: The Registration Date field has edits that prevent the worker from backdating the Program registration date to a date before the first episode date. The Exit Date field is populated by the system only after a program is exited.

The following example shows the data elements collected at the General Program Summary level:



The Education Status, Highest School Grade Completed, Employment Status and Unemployment Insurance Programs (U.I.) are system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

It is important that the entries are corrected or updated for the date of registration into the program on this page. Any or all of these fields may need updating to current information. The fields are available for update until an actual date of participation is established. If changes are needed for these fields after an actual date of participation has been established, case managers should complete a Staff Request (see Chapter 4-1).

These items are used for federal reporting and performance standards. The information at the time of registration is used for comparing against the customer's situation at the time of program exit and follow-up, e.g., Unemployed at Registration versus Employed at Exit. For WIA Title 1B, these same items are stored at the Program level as well, so these same comparisons can be made for each of them.

FIELD	REQUIRED	DESCRIPTION
Program Name	NA	The selected program.
Registration Date	Yes	The date the customer is registered for the Program episode.
Participation Date	NA	This display-only field shows a system-generated date stored when a program-funded service with an actual open date is entered under the Manage Services page.
Exit Date	NA	The date on which the customer is removed from the Program, ending the episode of participation in that Program. Exit Dates are recorded in Manage Exits. Exited Historical pages will have the date populated. This field is auto-populated by the system or blank if not exited.

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Education Status	Yes	Dropdown field in which workers must select the status of current school enrollment: • Attending High School or Less • Attending Alternative School • Attending Post High School • Not Attending, Dropout • Not Attending, High School Graduate
Highest School Grade Completed	Yes	Dropdown field in which a worker must select the highest level of school completed by the individual at the time of program registration. The options for selection in this field are determined by the selection in the Education Status field. This field is populated from the Customer Record, but must be updated as appropriate.
Employment Status	Yes	Dropdown field in which workers must select the response that best describes the customer's employment status. • Employed • Not Employed • Employed – Received Notice of Termination • Employed – Received Notice of Military Separation
Unemployment Insurance Programs (U.I.)	Yes	Dropdown field in which workers must select the correct Unemployment Insurance status: • Eligible claimant referred by WPRS • Eligible claimant not referred by WPRS • Exhaustee • Neither claimant nor exhaustee WPRS = Worker Profiling and Reemployment Services
Pre-Participation Earnings	No	Text fields in which workers from local area can record quarterly wage earnings prior to registration. This field is not used in actual performance calculation.

WIA Title 1 Summary

There are only a few data elements collected at the Title 1 level, all of which need to be federally reported regardless of Program Area affiliation.

These Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Veteran Status	NA	This field is system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
Recently Separated Veteran	NA	This field is system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
Campaign Veteran	NA	This field is system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
VRAP Participant	NA	This field is system-entered based on the Customer Record. This information was entered by a worker (case manager).
Disabled Veteran	NA	This field is system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
TAP Workshop in 3 Prior Years	NA	This field is system-entered based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).

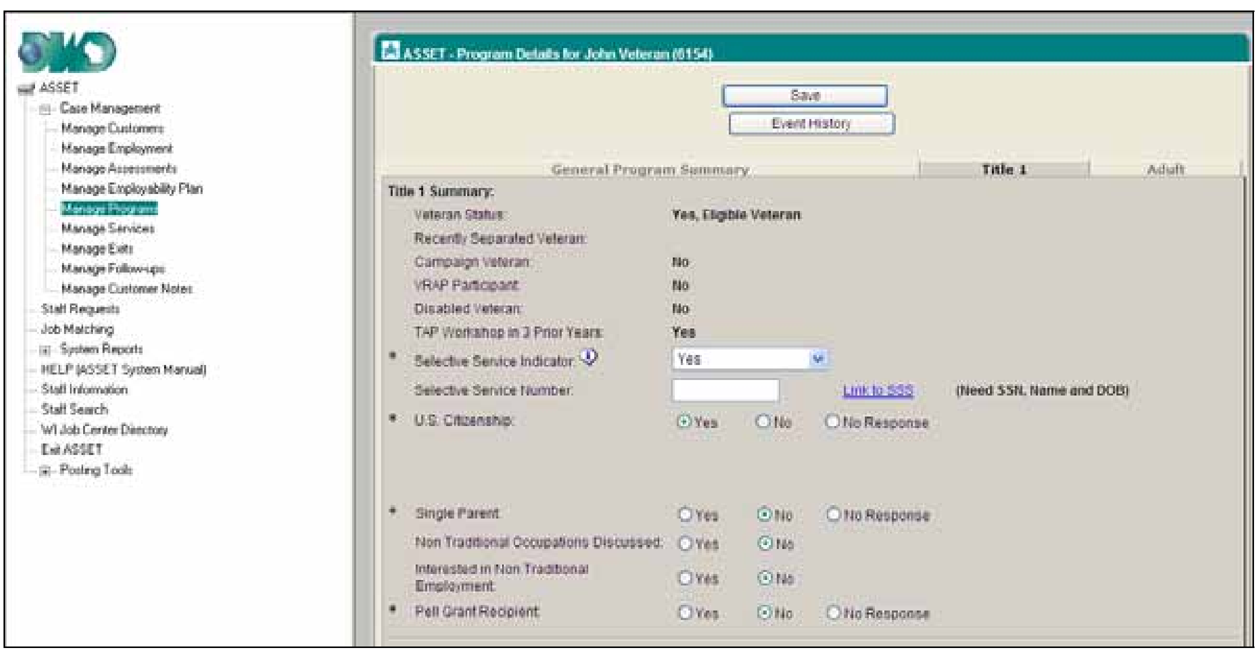
3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Selective Service Indicator	Yes	Dropdown field in which the user selects whether the individual was required to register with Selective Service: • Yes • No • Not Required • Exempted Veteran • Waived • Less than 18 Years Old
Selective Service Number	No	Text entry field in which the user enters the Selective Service number for the individual. Users can link to the Selective Service system website to obtain the selective service number for the individual. Note that the SSN, name and DOB are necessary to obtain the selective service number.
U.S. Citizenship	Yes	Select Yes if the individual is a U.S. Citizen. Select No if the individual does not meet the conditions described above.
Legally Authorized to Work	Yes	Dynamically appears only when U.S. Citizenship response is "No." Select Yes if the individual is a legally authorized to work. Select No if the individual does not meet the conditions described above.
Work Authorization Expiration Date	Yes	Dynamically appears only when U.S. Citizenship response is "No." This field is required if Legally Authorized to Work response is "Yes." Enter the expiration date from the individual's Permanent Resident Card (Green Card). If the card does not have an expiration date, enter 12/31/9999.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Single Parent	Yes	Select Yes if the individual is a single parent. Select No if the individual does not meet the conditions described above.
Non Traditional Occupations Discussed	No	Select Yes if non traditional occupations were discussed with the individual. Select No if the above described conditions have not been met.
Interested in Non Traditional Employment	No	Select Yes if the individual is interested in non traditional employment. Select No if the individual does not meet the conditions described above.
Pell Grant Recipient	Yes	Select Yes if the individual is a Pell Grant recipient. Select No if the individual does not meet the conditions described above.

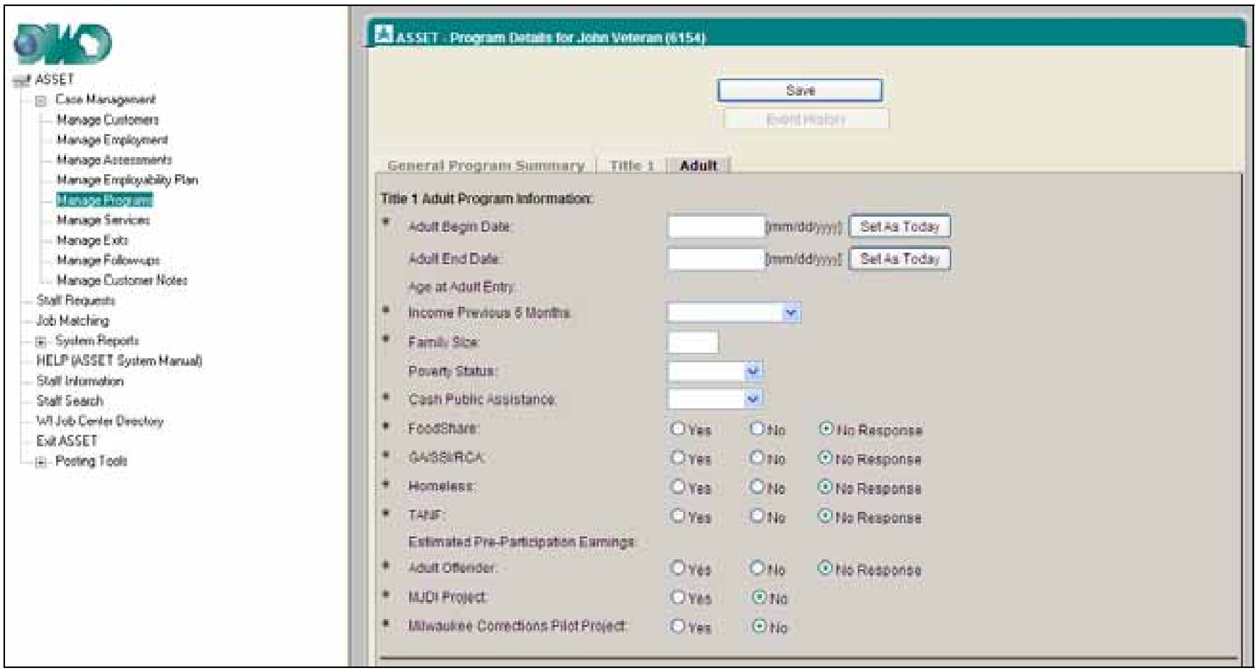


ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

Title I Adult

The WIA Adult Program Area page collects the data necessary for establishing this customer in the Adult program area. The information is gathered by the worker and entered into ASSET. **ASSET does not perform any eligibility determinations.**



The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Adult Begin Date	Yes	Text entry field in which the user enters the date of Program Area registration as an Adult. Cannot be backdated more than 15 days, cannot be a future date.

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Adult End Date	No	Text entry field in which the user enters the date the Adult Program Area ends. Workers will return to this page to enter the end date of program area participation after all services to the customer have ended. Note: If an Adult End Date is not entered, it will be auto-populated during exit processing.
Age at Adult Entry	No	Display-only field showing the age at Adult Program Area registration.
Income Previous 6 Months	Yes	Dropdown field in which the user chooses the appropriate response regarding income for the 6-month period prior to application: • At or below the Federal Poverty Level (FPL) • At or below the Lower Living Standard Income Level (LLSIL) • Not Low Income.
Family Size	Yes	Text entry field in which the user enters the number of individuals in the family.
Poverty Status	No	Dropdown field in which the user enters information about the individual's poverty status: • FPL (At or below Federal Poverty Level) • FPL 150% (Above FPL, but less than 150% FPL) • FPL 200% (Above FPL, but less than 200% FPL) • LLSIL (At or below the Lower Living Standard Income Level)

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Cash Public Assistance	Yes	Dropdown field in which the user selects whether the person is receiving cash public assistance and what type: • Federal • State • Local • No (if the person is not receiving)
FoodShare	Yes	Select Yes if the individual is receiving, or has been determined eligible within the 6-month prior to program participation, FoodShare (previously known as Food Stamps). Select No if the individual does not meet the conditions described above.
GA/SSI/RCA	Yes	Select Yes if the individual is receiving General Assistance (General Relief), Supplemental Security Income, or Refugee Cash Assistance. Select No if the individual does not meet the conditions described above.
Homeless	Yes	Select Yes if the individual lacks a fixed, regular, adequate night time residence. Select No if the individual does not meet the conditions described above
TANF	Yes	Select Yes if the individual is listed on the welfare grant or has received cash assistance or other TANF support services from the TANF agency in the last six months prior to participation in the program. Select No if the individual does not meet the conditions described above.

FIELD	REQUIRED	DESCRIPTION
Estimated Pre-Registration Earnings	No	This field should be used once you have entered a Registration Date and completed all the other fields on the page. Then click on the button labeled "Refresh Prior Quarter Dates." The wages entered can be estimated. The data entered can be used locally to predict performance and program outcomes. However, the UI Wage record data will be the data source used by DWD when computing actual performance results.
Adult Offender	Yes	Select Yes to indicate if this is a person at the time of participation in the program, is or has been subject to any stage of the criminal justice process. Or, requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction. Select No if the person does not meet the conditions described above.
MJDI Project	Yes	Radio Yes or No Button used only by project staff.
Milwaukee Corrections Pilot Project	Yes	Radio Yes or No Button used only by project staff.

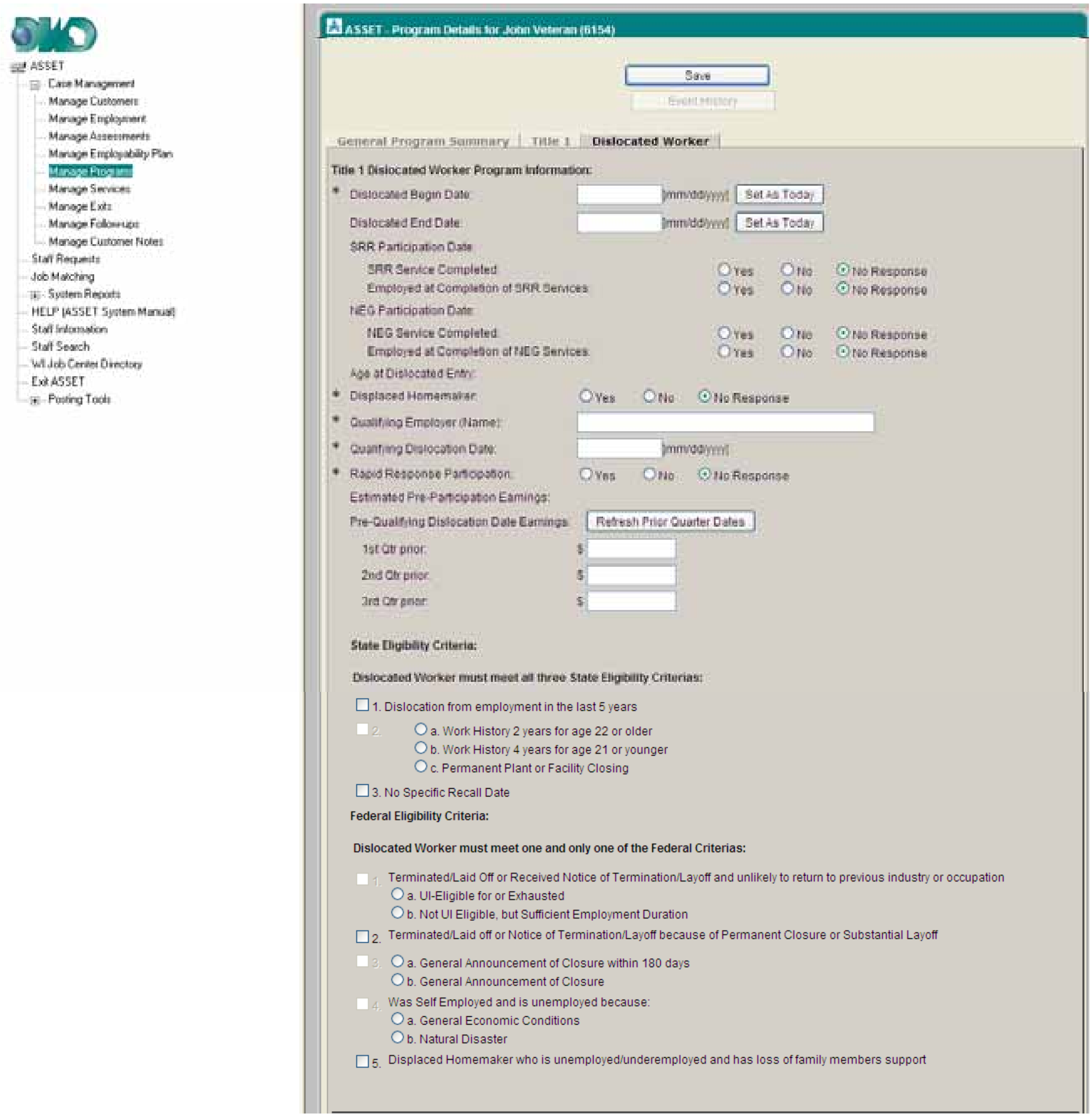
WIA Dislocated Worker Program Area

The Dislocated Worker Program Area information is collected for federal reporting of individuals who have been determined to be eligible for the Dislocated Worker program. Program Area eligibility is worker-determined. ASSET does not perform eligibility determinations at this time. However, the worker is given some assistance in making this determination by having the State and Federal Eligibility Criteria displayed on the screen. To qualify for the Dislocated Worker program, all three State criteria and one of the Federal criteria must be met. ASSET provides the worker with a place to document this determination.

An example of the Dislocated Worker Program Area screen follows:

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____



Note that the Special Response (SRR) and National Emergency Grant (NEG) Participation Dates are located on the Title I Dislocated Worker Tab. This field is populated when a staff enters a Service that is beyond the Core/Self or Informational level. The Service must have an

Actual open date with the funding source selected as either Special Response or National Emergency Grant.

The Field Descriptions Are:

FIELD	REQUIRED	DESCRIPTION
Dislocated Begin Date	Yes	The date of Program Area registration as a dislocated worker. Cannot be backdated more than 15 days and cannot be a future date.
Dislocated End Date	No	The date the Dislocated Worker Program Area ends. Workers will return to this page to enter the end date of program area participation after all services to the customer have ended. Note: If a Dislocated End Date is not entered, it will be auto-populated during exit processing.
SRR Participation Date	No	This date is populated when a program funded service with an actual open date is entered under the Manage Services section. This field is located on the Title I Dislocated Worker tab on the Manage Programs page.
NEG Participation Date	No	This date is populated when a program funded service with an actual open date is entered under the Manage Services section. This field is located on the Title I Dislocated Worker tab on the Manage Programs page.
Age at Dislocated Entry	No	Display-only field showing the age at Dislocated Worker Program Area registration.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Displaced Homemaker	Yes	Select Yes if this individual is a person who has been providing unpaid services to family members in the home and has been dependent on the income of another family member but is no longer supported by that income and the individual is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment. Select No if the individual does not meet the conditions above.
Qualifying Employer Name	Yes	Text Field in which the user enters the Name of the Employer for which the customer worked at the time of dislocation.
Qualifying Dislocation Date	Yes	Text Field in which the user enters the date that is considered the date of separation or dislocation. This date is the last date of employment at the dislocation job.
Rapid Response Participation	Yes	Select Yes or No to indicate whether or not an individual participated in a Rapid Response orientation prior to or subsequent to participation in the program.
Estimated Pre-Registration Earnings	No	This field is for local area recording of earnings prior to registration. Each WDB may determine how this field is to be used, for example, earnings in 6 months prior to registration or earnings in the two quarters before registration might give local agencies some information for performance monitoring. This field is NOT used in actual Performance calculation.
Pre-Qualifying Dislocation Date Earnings	No	Calculated dates of the quarter for which wages should be entered.

ASSET Users' Guide

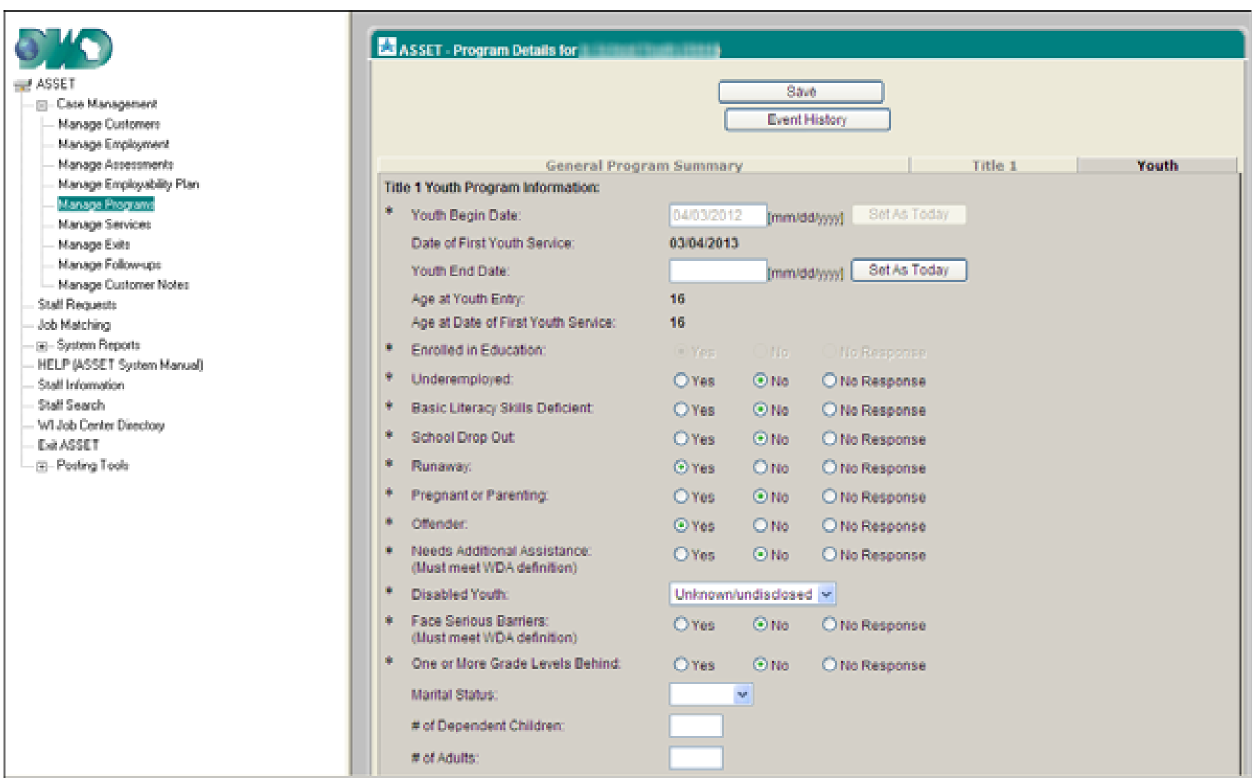
ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
State Eligibility Criteria	Yes	See screenshot on page 14. The worker must determine if all criteria are met and affirms this determination by selecting the appropriate checkbox(s).
Federal Eligibility Criteria	Yes	See screenshot on page 14. The worker determines which one of the Federal criteria is being met and affirms this determination by selecting the appropriate checkbox.

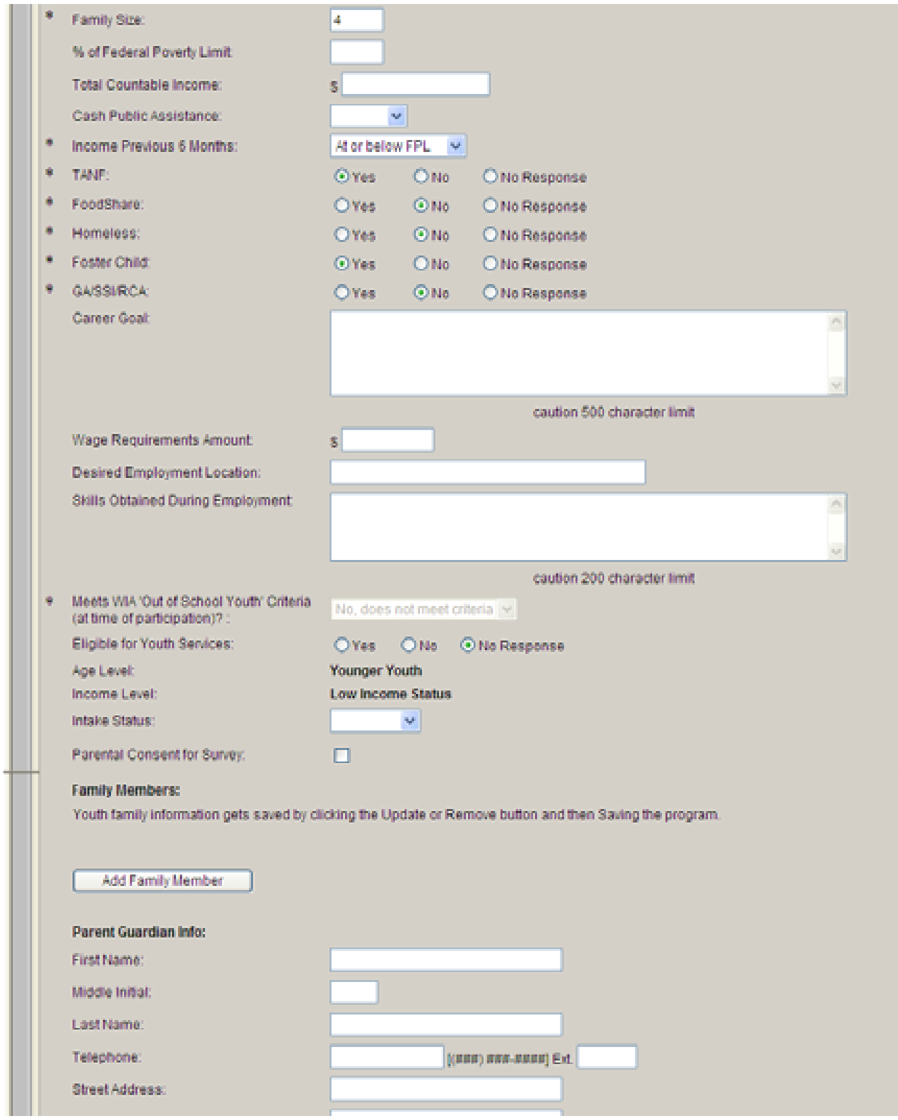
WIA Title 1 Youth

The WIA Title 1 Youth Program Area has a large number of data elements regarding the individual's status or situation at the point of registration. The page is quite long and workers will need to use the scroll bar at the right of the page to move up or down through the entire display. An example of the screen follows:



ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____


* Family Size: 4
% of Federal Poverty Limit:
Total Countable Income: $
Cash Public Assistance:
* Income Previous 6 Months: At or below FPL
* TANF: Yes No No Response
* FoodShare: Yes No No Response
* Homeless: Yes No No Response
* Foster Child: Yes No No Response
* GA/SSI/RCA: Yes No No Response
Career Goal:
caution 500 character limit
Wage Requirements Amount: $
Desired Employment Location:
Skills Obtained During Employment:
caution 200 character limit
* Meets WIA 'Out of School Youth' Criteria (at time of participation)? : No, does not meet criteria
Eligible for Youth Services: Yes No No Response
Age Level: Younger Youth
Income Level: Low Income Status
Intake Status:
Parental Consent for Survey:
Family Members:
Youth family information gets saved by clicking the Update or Remove button and then Saving the program.
Add Family Member
Parent Guardian Info:
First Name:
Middle Initial:
Last Name:
Telephone: (###) ###-####) Ext.
Street Address:

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

There is a text box that displays dynamically in which the worker can list the names, income source and monthly income amount for all family members in the household in which the Youth participant resides. By clicking on the Add Family Member button, the additional fields are made available for updates.

The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Youth Begin Date	Yes	Text entry field in which workers enter the date of Program Area registration as a Youth. Cannot be backdated more than 15 days, cannot be a future date.
Date of First Youth Service	No	This field is system populated when a program element level service (except Design Framework) has been entered with an actual begin date in ASSET.
Youth End Date	No	Text entry field in which the worker enters the date the Youth Program Area ends. Workers will return to this page to enter the end date of program area participation after all services to the customer have ended.
Age at Youth Entry	No	Display-only, system-populated field that displays the age at Youth Program Area registration.
Age at Date of First Youth Service	No	Display-only, system-populated field that displays the age of the participant as of the date of the first youth service.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Enrolled in Education	Yes	Select Yes if the individual, at the time of participation or any time during participation in the program, is enrolled in secondary school, post-secondary school, adult education programs, or any other organized program of study that leads to a degree or certificate. ***If the Yes response is selected and Saved, the field then becomes unavailable for update and a change can be made only through the staff request process (see chapter 4-1).** Select No if the individual does not meet the conditions described above.
Underemployed	Yes	Select Yes if the individual is an out-of-school youth who has never held a full-time job. Select No if the individual does not meet the condition described above.
Basic Literacy Skills Deficient	Yes	Select Yes if the individual computes or solves problems, reads, writes or speaks English at or below the 8^{th} (8.9 or less) grade level on a generally accepted standardized test or comparable score on a criterion referenced test; or is unable to compute or solve problems, read, write, or speak English at a level necessary to function on the job, in the individual's family or in society. Select No if the individual does not meet the conditions described above.
School Dropout	Yes	Select Yes if the individual is not attending any school and has not received a secondary school diploma or its recognized equivalent. Select No if the individual does not meet the conditions described above.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Runaway	Yes	Select Yes if the individual is under the age of 18 and is absent from home or place of legal residence without family permission. Select No if the individual does not meet the conditions described above.
Pregnant or Parenting	Yes	Select Yes if the individual is under 22 years of age and is pregnant or is a youth, male or female, who is providing custodial care for one or more dependents under age 18. Select No if the individual does not meet the conditions described above.
Offender	Yes	Select Yes if the individual at the time of participation in the program, is or has been subject to any stage of the criminal justice process for committing a status offense or delinquent act. Or, requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction for committing delinquent acts, such as crimes against person, property, status offenses or other crimes. (See Guide to WIA Title 1B Eligibility Determination and Documentation for further guidance.) Select No if the individual does not meet the conditions described above.
Needs Additional Assistance	Yes	Select Yes if the individual meets the WDA definition. Select No if the individual does not meet the conditions described above.
Disabled Youth	Yes	Select Yes if the individual has physical or mental impairment that substantially limits one or more of the individual's major life activities. Select No if the individual does not meet the conditions described above. Select Unknown/Undisclosed if the individual does not wish to disclose disability status.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Faces Serious Barriers	Yes	Select Yes if the individual has multiple barriers to employment or educational achievement of goals (5% WDA defined barrier). Select No if the individual does not meet the conditions described above.
One or more Grade Levels Behind	Yes	Select Yes if the youth is one or more grade levels below the grade level appropriate to the youth's age. Select No if the individual does not meet the conditions described above.
Marital Status	No	Select the appropriate status from the dropdown.
# of Dependent Children	No	Enter the number of children dependent on this Youth participant.
# of Adults	No	Enter the number of adults in the family.
Family Size	Yes	Enter the number of family members. Family means two or more persons related by blood, marriage, or decree of court, who are living in a single residence.
% of Federal Poverty Limit	No	Enter the worker-calculated percent of the Federal Poverty Limit for this participant.
Total Countable Income	No	Enter the total income counted in the FPL calculation.
Cash Public Assistance	No	Select from the dropdown if the person is receiving Federal, State or Local government cash payments for which eligibility is determined by a needs or income test, or No if not receiving.
Income Previous 6 Months	Yes	Choose appropriate response from the dropdown regarding income for the 6-month period prior to application. At or below 100% of the Federal Poverty Level (FPL), at or below 70% of the Lower Living Standard Income Level, (LLSIL), or Not Low Income.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

<table>
<tr><th>FIELD</th><th>REQUIRED</th><th>DESCRIPTION</th></tr>
<tr><td>TANF</td><td>Yes</td><td>Select Yes if the individual is listed on the welfare grant or has received cash assistance or other TANF support services from the TANF agency in the last six months prior to participation in the program.

Select No if the individual does not meet the conditions described above.</td></tr>
<tr><td>FoodShare</td><td>Yes</td><td>Select Yes if the individual is receiving, or has been determined eligible within the 6-month prior to program participation, FoodShare (previously known as Food Stamps).

Select No if the individual does not meet the conditions described above.</td></tr>
<tr><td>Homeless</td><td>Yes</td><td>Select Yes if the individual:

1. lacks a fixed, regular, or adequate nighttime residence; or

2. has a primary nighttime residence that is:

a. a public or private operated shelter for temporary accommodation;

b. an institution providing temporary residence for individuals intended to be institutionalized; or

c. a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings.

(The description above is the same for Runaway Youth).

Select No if the individual does not meet the conditions described above.</td></tr>
</table>

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Foster Child	Yes	Select Yes if the individual is in foster care or has been in the foster care system. Select No if the individual does not meet the conditions described above.
GA/SSI/RCA	Yes	Select Yes if the individual is receiving General Assistance (General Relief), Supplemental Security Income, or Refugee Cash Assistance. Select No if the individual does not meet the conditions described above.
Career Goal	No	Text box in which the user describes the age-appropriate career goal(s) based on the information gathered during the assessment process. Consideration should be given to nontraditional occupations.
Wage Requirements Amount	No	Text box to enter an hourly wage rate sought by the participant.
Desired Employment Location	No	Text field to designate the location where the participant is able to work, given transportation and other factors.
Skills Obtained During Employment	No	Text field to list or explain the skills the participant gained, or will gain, in employment.

FIELD	REQUIRED	DESCRIPTION
Meets WIA Out of School Youth Criteria?	Yes	System populated based on the selection in Education Status drop down list on the General Program Summary tab. If the Education Status is 'Attending High School or Less' or 'Attending Alternative School' then 'Meets WIA Out of School Youth Criteria (at time of participation)' field is defaulted to 'No, does not meet criteria'. If the Education Status is 'Attending Post High School', 'Not Attending, Dropout' or 'Not Attending, High School Graduate' then 'Meets WIA Out of School Youth Criteria (at time of participation)' field is defaulted to 'Yes, meets criteria'.
Eligible for Youth Services?	No	Select Yes if the individual is eligible for WIA Title 1 Youth services. Select No if the individual does not meet the conditions described above.
Age Level	No	System-populated, display-only field showing the age level of the participant based on age at registration for the Youth Program Area, either Younger Youth or Older Youth.
Income Level	No	System-populated, display-only field showing either Low Income or Not Low Income, as determined by the responses to the prior fields.
Intake Status	No	Dropdown field to indicate whether the intake status is Complete or Pending.
Parental Consent for Survey	No	Checkbox to indicate if youth (under the age of 18) has permission to participate in a customer survey for the WIA program.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Family Members	No	This section allows workers to add specific information about family members of the youth participant, including monthly income amount and source.
Parent/Guardian Information	No	Complete the Parent/Guardian information for all Youth Program participants who are under the age of 18 at program registration.

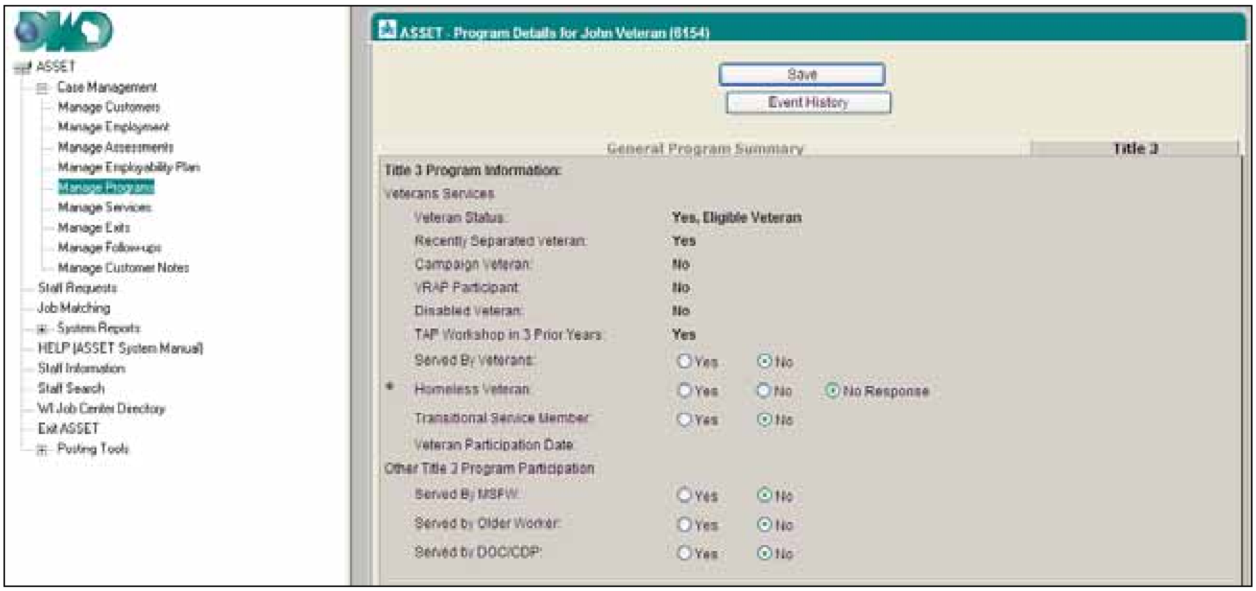
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

Title 3 Program Information

The Title 3 (Wagner-Peyser) Program data elements are used for tracking customer participation in special Job Center programs connected to Job Service.



These Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Veteran Status	NA	This field is system populated based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
Recently Separated Veteran	NA	This field is system populated based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
Campaign Veteran	NA	This field is system populated based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
VRAP Participant	NA	This field is system populated based on the Customer Record. This information was entered by a worker (case manager).

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Disabled Veteran	NA	This field is system populated based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
TAP Workshop in 3 Prior Years	NA	This field is system populated based on the Customer Record. This information was entered by either the customer using JCW or by a worker (case manager).
Served By Veterans	No	Select Yes if the individual is receiving services through the Veterans program. Select No if the individual does not meet the conditions described above.
Homeless Veteran	Yes	Select Yes if the individual served in the active military, was discharged or released from service under conditions other than dishonorable, and lacks a fixed, regular, and adequate nighttime residence. Select No if the individual does not meet the conditions described above.
Transitional Service Member	No	Select Yes if the individual is a transitional service member. Select No if the individual does not meet the conditions described above.
Veteran Participation Date	NA	This field is system populated once a service has an actual begin date and is at the core staff assisted level as identified on Mange Services page.
Served by MSFW	No	Select Yes if the individual is receiving services through the Migrant and Seasonal Farm Worker program. Select No if the individual does not meet the conditions described above.

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Served by Older Worker	No	Select Yes if the individual is receiving services through the Title 5 Older Worker program. Select No if the individual does not meet the conditions described above.
Served by DOC/CDP	No	Select Yes if the individual is receiving services through the DOC/CDP project. Select No if the individual does not meet the conditions described above.

TAA Program Information

The TAA Program data elements are used for case management as well as federal reporting purposes. There are several required fields (marked with an asterisk *) that are needed for federal tracking or for use in performance calculations.

The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Is this a Wisconsin Petition Number?	Yes	Select Yes if the petition number is a Wisconsin petition number. Select No if the petition number is an out-of-state petition number.
Petition Number	Yes	Display-only field showing the applicable petition number for this episode. Use the "Select Petition Number" button next to this field to bring up a Petition Number Lookup window in which the user can select the correct petition number to populate this field.
Petition Certification Date	NA	Display-only field showing the date the selected petition was certified.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Benefits Under Certification Issued Within Last 10 Years	Yes	Select Yes if the individual received a benefit or service as part of a previous certification within the last 10 years. Select No if the individual does not meet the conditions described above.
Age at TAA Registration	NA	Display-only field showing the age of the individual at the time of TAA Registration.
Qualifying Employer (Name)	Yes	Text field in which the user enters the name of the qualifying employer.
Job Title/ Description	Yes	Text field in which the user enters the job title/description the individual held with the qualifying employer.
Pay	Yes	Text field in which the user enters the rate of pay for the job held with the qualifying employer.
Rate	Yes	Dropdown field in which the user specifies the method or rate of payment the individual had with the qualifying employer: • Per Hour • Per Day • Per Week • Per Month • Per Year
Other	No	Dropdown field in which the user can indicate whether the qualifying employer provided any additional type of payment or remuneration: • Plus Tips • Commission • Piecework • Room/Board

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Eligibility Status	Yes	Dropdown field in which the user specifies the eligibility status for TAA: • Incumbent worker • Laid off worker • Laid off worker – TAA/TRA Eligible • Laid off worker – TAA Eligible • Laid off worker – Not Eligible • Incumbent worker – TAA Eligible • Incumbent worker – Not Eligible
Basic TRA Available	No	Checkbox that, when selected, indicates whether basic TRA (Trade Readjustment Allowance) is available to the TAA participant.
Start Date	Yes	Text entry field in which the user enters the start date of the individual's employment with the qualifying dislocation employer.
TAA Application Date	Yes	Text entry field in which the user enters the TAA application date. This is a required field depending on the selection in the Eligibility Status field.
Date of Determination	Yes	Text entry field in which the user enters the date the determination of TAA eligibility was issued. This is required field depending on the selection in the Eligibility Status field. The date of determination cannot be earlier than the TAA application date.
Qualifying Dislocation Date	Yes	Text entry field in which the user enters the dislocation date with the qualifying employer.
Most Recent Qualifying Separation Date	Yes	Text entry field in which the user enters the most recent separation date with the qualifying employer. This is required field depending on the selection in the Eligibility Status field.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Reason for Leaving	Yes	Dropdown field in which the user selects the reason the individual left employment with the qualifying employer: • Business Closed • Fired • Fulfilled Obligation • Illness • Job Advancement • Laid-off • Maternity Leave • Military Draft/Enlistment • Military Release • Quit • Retired • Relocated • Returned to School • Seasonal Work • Still Employed • Strike • Other N.E.C.
Temporary Assistance to Needy Families (TANF)	Yes	Select Yes if this is an individual who is listed on the welfare grant and has received cash assistance or other support services from the TANF agency at any time during participation the program. Select No if the individual does not meet the conditions described above.
SSI/SSDI	Yes	Dropdown field in which the user selects whether the individual is receiving Supplemental Security Income (SSI) and/or Social Security Disability Insurance(SSDI): • No • SSI Only • SSDI Only • SSI and SSDI

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
General Assistance	Yes	Select Yes if the individual is receiving General Assistance (General Relief). Select No if the individual does not meet the conditions described above.
Food Share	Yes	Select Yes if the individual is receiving, or has been determined eligible within the 6-month prior to program participation, Food Share (previously known as Food Stamps). Select No if the individual does not meet the conditions described above.
Refugee Cash Assistance	Yes	Select Yes if the individual is receiving Refugee Cash Assistance. Select No if the individual does not meet the conditions described above.
Pell Grant Recipient	Yes	Select Yes if the individual is a Pell Grant recipient. Select No if the individual does not meet the conditions described above.
Estimated Pre-Participation Earnings	NA	This field should be used once a Registration Date has been entered and all other fields on the page have been completed. Then click on the button labeled "Refresh Prior Quarter Dates." The wages entered can be estimated. The data entered can be used locally to predict performance and program outcomes. However, UI Wage records will be the data source used by DWD when computing actual performance results.

ASSET CASE MANAGEMENT FUNCTION

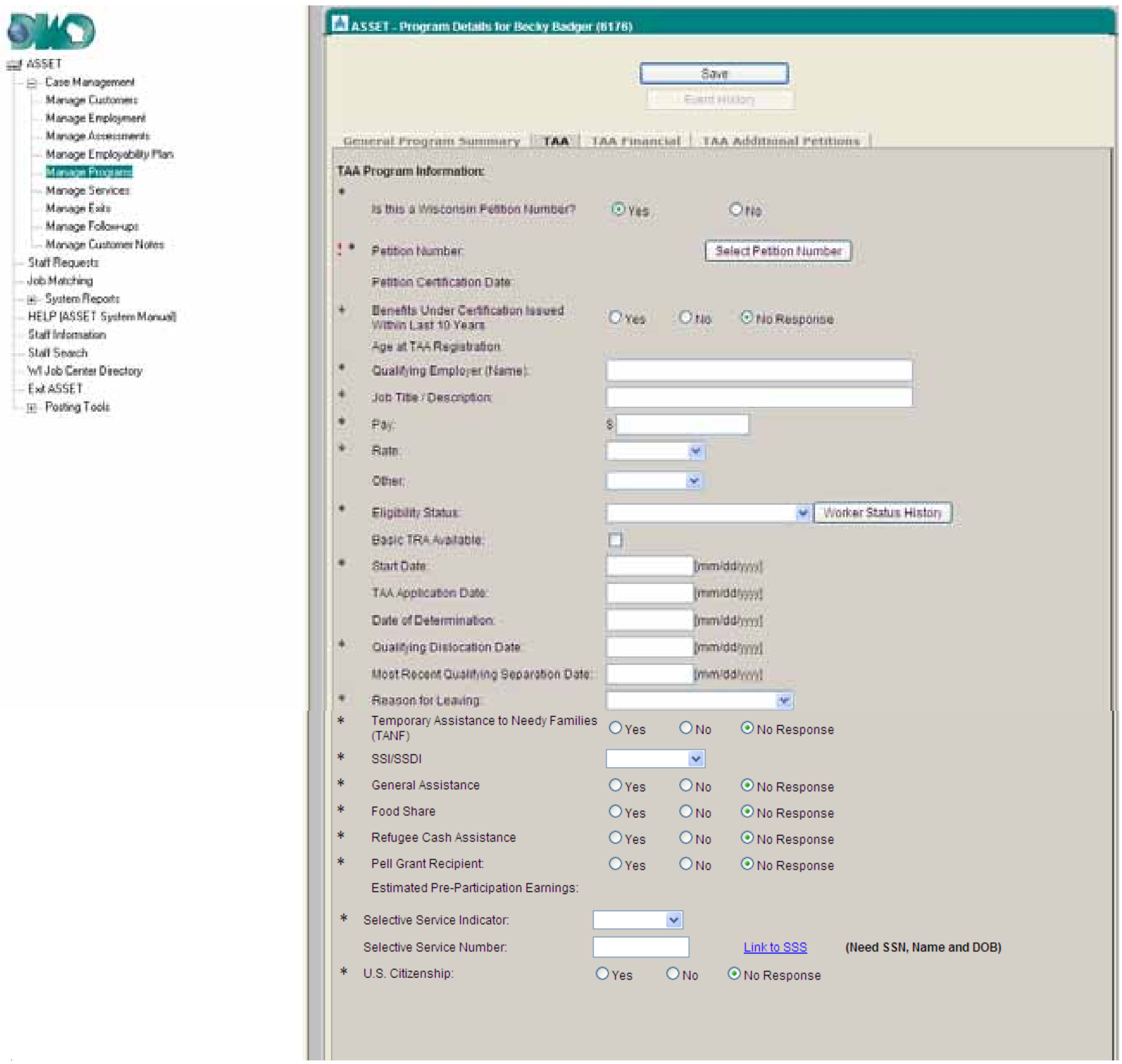
3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Selective Service Indicator	Yes	Dropdown field in which the user selects the individual's Selective Service registration status. • Yes • No • Not Required • Exempted Veteran • Waived • Less than 18 Years Old
Selective Service Number	No	Text entry field in which the user enters the Selective Service number for the individual. Users can link to the Selective Service system website to obtain the selective service number for the individual. Note that the SSN, name and DOB are necessary to obtain the selective service number.
U.S. Citizenship	Yes	Select Yes if the individual is a U.S. Citizen. Select No if the individual does not meet the conditions described above.
Legally Authorized to Work	Yes	Dynamically appears only when U.S. Citizenship response is "No." Select Yes if the individual is legally authorized to work. Select No if the individual does not meet the conditions described above.
Work Authorization Expiration Date	Yes	Dynamically appears only when U.S. Citizenship response is "No." This field is required if Legally Authorized to Work response is "Yes." Enter the expiration date from the individual's Permanent Resident Card (Green Card). If the card does not have an expiration date, enter 12/31/9999.

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

Following is an example of the TAA Program Details screen:



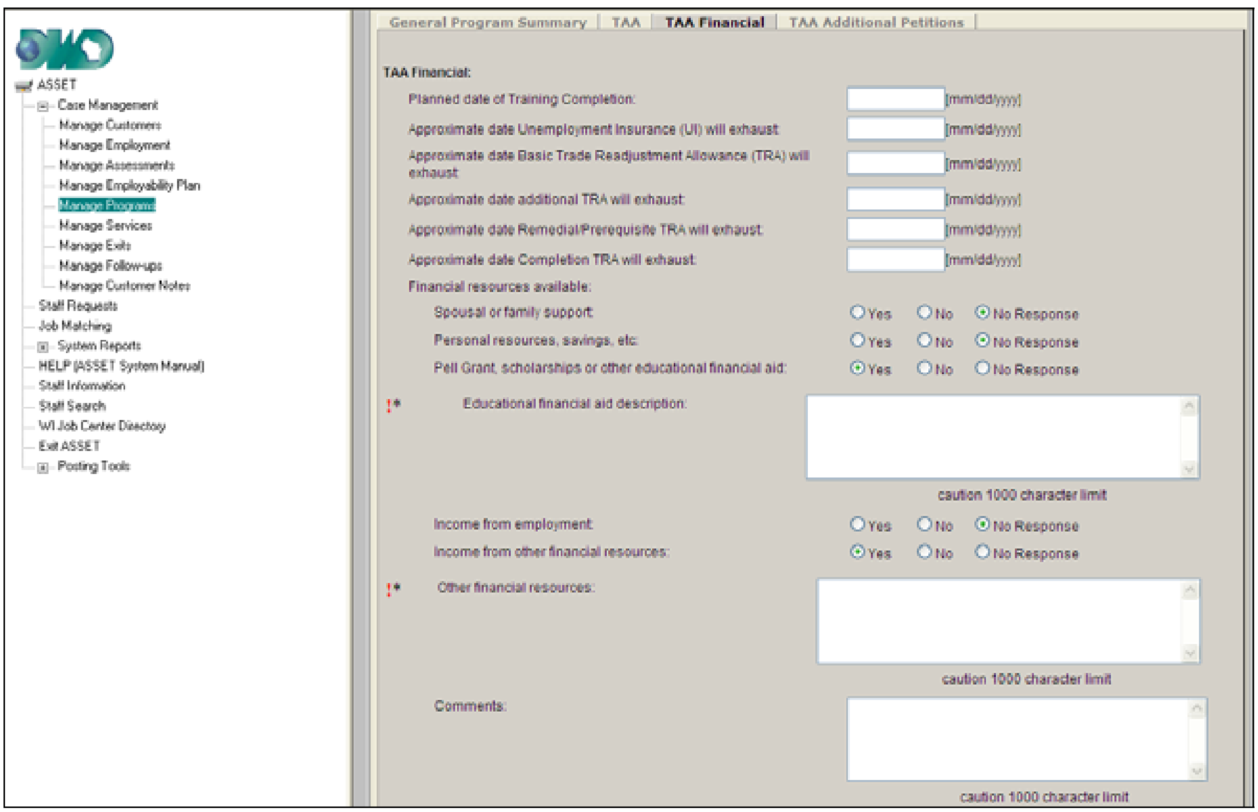
TAA Financial Plan

The TAA Financial Plan section captures the financial data regarding how a TAA recipient will support him/herself while in training. The information entered on the screen dynamically creates the TAA Financial Plan in System Reports. This screen should be updated as changes in the individual's circumstances occur. An Event History of changes is maintained. The TAA Financial Support Statement may be printed from System Reports. The printed form is then signed by both the case manager and the customer.

If Pell Grant, scholarships or other educational financial aid is marked Yes, a text box displays in which the user must enter a required description of the type, amount, duration and any other pertinent information about the aid.

If Income from other financial resources is marked Yes, a text box displays in which the user must enter required description of the type, amount, duration and any other pertinent information about that income resource.

The Comments text box should be used to record any other comments about the person's financial situation as it relates to participation in training.



ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Planned date of Training Completion	No	Text entry field in which the user enters the planned date of training completion.
Approximate date Unemployment Insurance (UI) will exhaust	No	Text entry field in which the user enters the approximate date the individual's Unemployment Insurance (UI) benefits will exhaust.
Approximate date Basic Trade Readjustment Allowance (TRA) will exhaust	No	Text entry field in which the user enters the approximate date the individual's basic Trade Readjustment Allowance (TRA) will exhaust.
Approximate date additional TRA will exhaust	No	Text entry field in which the user enters the approximate date the individual's additional TRA will exhaust.
Approximate date Remedial/Prerequisite TRA will exhaust	No	Text entry field in which the user enters the approximate date the individual's remedial/prerequisite TRA will exhaust.
Approximate date Completion TRA will exhaust	No	Text entry field in which the user enters the approximate date the individual's completion TRA will exhaust.

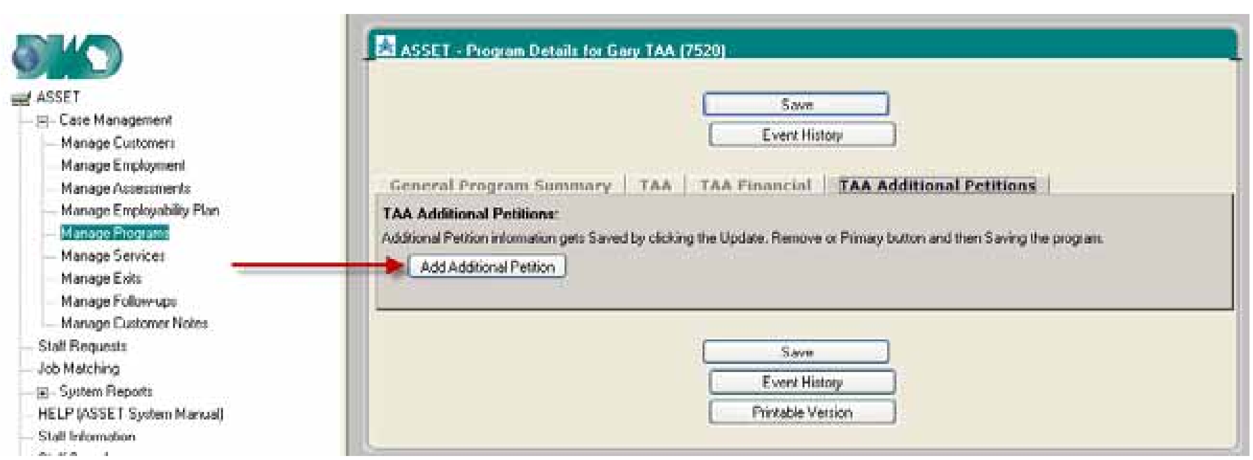
ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Financial resources available	No	Radio buttons (Yes, No, No Response) the user selects to indicate whether the individual has the following financial resources available to him/her: • Spousal or family support • Personal resources, savings, etc. • Pell Grant, scholarships or other educational financial aid • Income from employment • Income from other financial resources Note: If Pell Grant, scholarships or other educational financial aid or Income from other financial resources is marked Yes, a text box displays in which the user must enter a required description of the type, amount, duration and any other pertinent information about the aid.
Comments	No	Free-form text field in which the user records any other comments about the person's financial situation as it relates to participation in training

TAA Additional Petitions

The TAA Additional Petitions tab provides the ability to track multiple petition applications and services linked to a particular petition in a single episode.

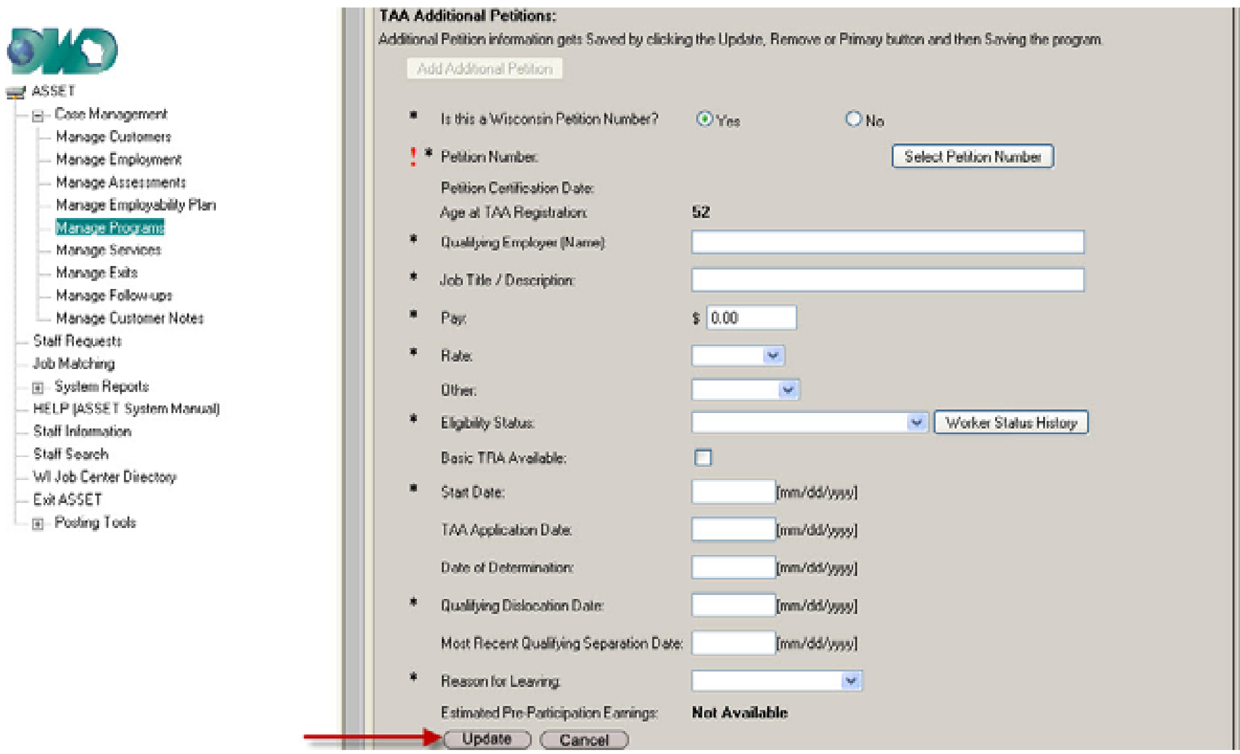


Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

Click on the Add Additional Petition button to launch the screen for data entry. Once the information for the additional petition is entered, the Update button at the bottom of the screen must be clicked to allow the information to be saved.



The Field Definitions are:

FIELD	REQUIRED	DESCRIPTION
Is this a Wisconsin Petition Number?	Yes	Select Yes if the petition number is a Wisconsin petition number. Select No if the petition number is an out-of-state petition number.
Petition Number	Yes	Display-only field showing the applicable petition number for this episode. Use the "Select Petition Number" button next to this field to bring up a Petition Number Lookup window in which the user can select the correct petition number to populate this field.

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

FIELD	REQUIRED	DESCRIPTION
Petition Certification Date	NA	Display-only field showing the date the selected petition was certified.
Benefits Under Certification Issued Within Last 10 Years	Yes	Select Yes if the individual received a benefit or service as part of a previous certification within the last 10 years. Select No if the individual does not meet the conditions described above.
Age at TAA Registration	NA	Display-only field showing the age of the registrant at the time of TAA Registration.
Qualifying Employer (Name)	Yes	System populated based on the Petition Number selected. This Text field can be updated.
Job Title/Description	Yes	Text field in which the user enters the job title/description the registrant held with the qualifying employer.
Pay	Yes	Text field in which the user enters the rate of pay for the job held with the qualifying employer.
Rate	Yes	Dropdown field in which the user specifies the method or rate of payment the participant had with the qualifying employer: • Hour • Day • Week • Month • Year

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

FIELD	REQUIRED	DESCRIPTION
Other	No	Dropdown field in which the user can indicate whether the qualifying employer provided any additional type of payment or remuneration: • Plus Tips • Commission • Piecework • Room/Board
Eligibility Status	Yes	Dropdown field in which the user specifies the eligibility status for TAA: • Incumbent worker • Laid off worker • Laid off worker – TAA/TRA Eligible • Laid off worker – TAA Eligible • Laid off worker – Not Eligible • Incumbent worker – TAA Eligible • Incumbent worker – Not Eligible
Basic TRA Available	No	Checkbox that, when selected, indicates whether basic TRA (Trade Readjustment Allowance) is available to the TAA participant.
Start Date	Yes	Text entry field in which the user enters the start date of the individual's employment with the qualifying dislocation employer.
TAA Application Date	No	Text entry field in which the user enters the TAA application date. This is a required field depending on the selection in the Eligibility Status field.
Date of Determination	No	Text entry field in which the user enters the date the determination of TAA eligibility was issued. This is required field depending on the selection in the Eligibility Status field. The date of determination cannot be earlier than the TAA application date.

ASSET CASE MANAGEMENT FUNCTION

3-6 MANAGE PROGRAMS

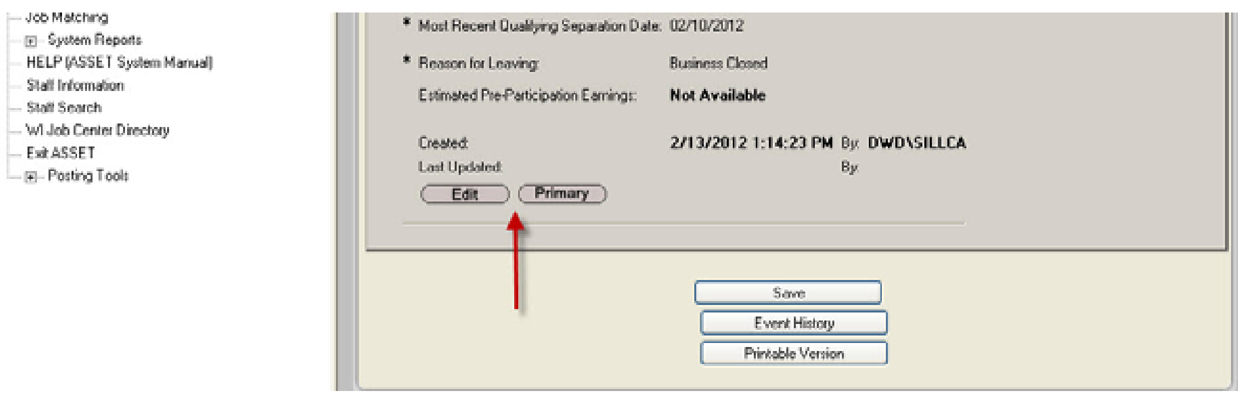
FIELD	REQUIRED	DESCRIPTION
Qualifying Dislocation Date	Yes	Text entry field in which the user enters the dislocation date with the qualifying employer.
Most Recent Qualifying Separation Date	Yes	Text entry field in which the user enters the most recent separation date with the qualifying employer. This is required field depending on the selection in the Eligibility Status field.
Reason for Leaving	Yes	Dropdown field in which the user selects the reason the individual left employment with the qualifying employer: • Business Closed • Fired • Fulfilled Obligation • Illness • Job Advancement • Laid-off • Maternity Leave • Military Draft/Enlistment • Military Release • Quit • Retired • Relocated • Returned to School • Seasonal Work • Still Employed • Strike • Other N.E.C.
Estimated Pre-Participation Earnings	NA	This field should be used once you have entered a Registration Date and completed all the other fields on the page. Then click on the button labeled "Refresh Prior Quarter Dates." The wages entered can be estimated. The data entered can be used locally to predict performance and program outcomes. However, UI Wage records will be the data source used by DWD when computing actual performance results.

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-6 ____MANAGE PROGRAMS____

Once the Additional Petition information has been saved, an Edit button and a Primary button will appear at the bottom of the TAA Additional Petitions tab. By clicking on the Edit button the Additional Petition information can be edited. To switch the Additional Petition number to the primary petition number, click on the Primary button and save (all services under the current primary petition must be closed before clicking on the Primary button.)



Return to Index – Click here

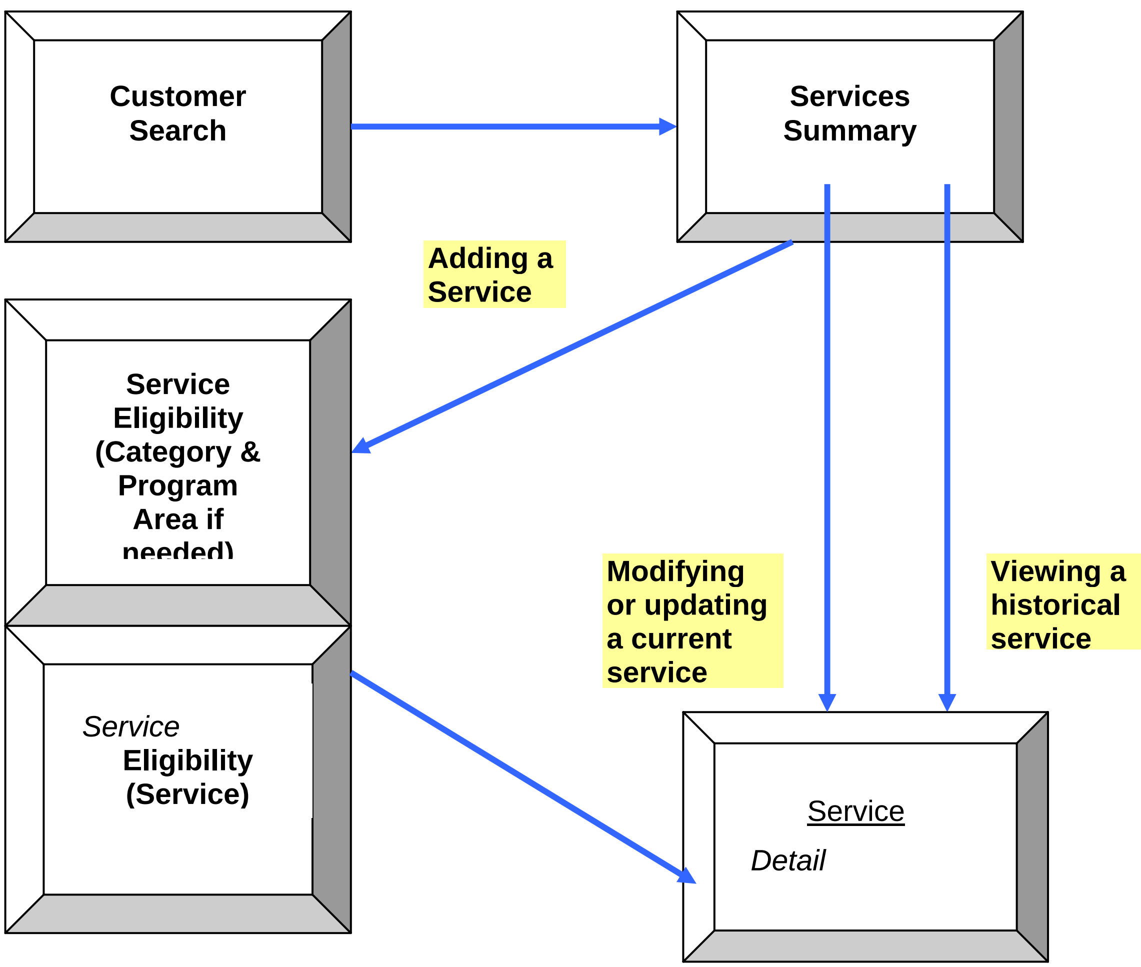
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 MANAGE SERVICES

The Manage Services function is used to track customer services and activities while participating in one or more of the Programs in ASSET. This function is important to federal reporting, making the accuracy and completeness of the information documented here critical for program evaluation and outcomes. To improve and protect the integrity of the information about services, the ASSET designs include several internal and page edits that require workers to enter data correctly.

Clicking on the Manage Services option on the Menu Tree launches the function. The first page is the familiar Search page, where the worker may choose a Previously Searched for Customer from the list, or do a Search or Advanced Search. This is the page flow for the Manage Services function:

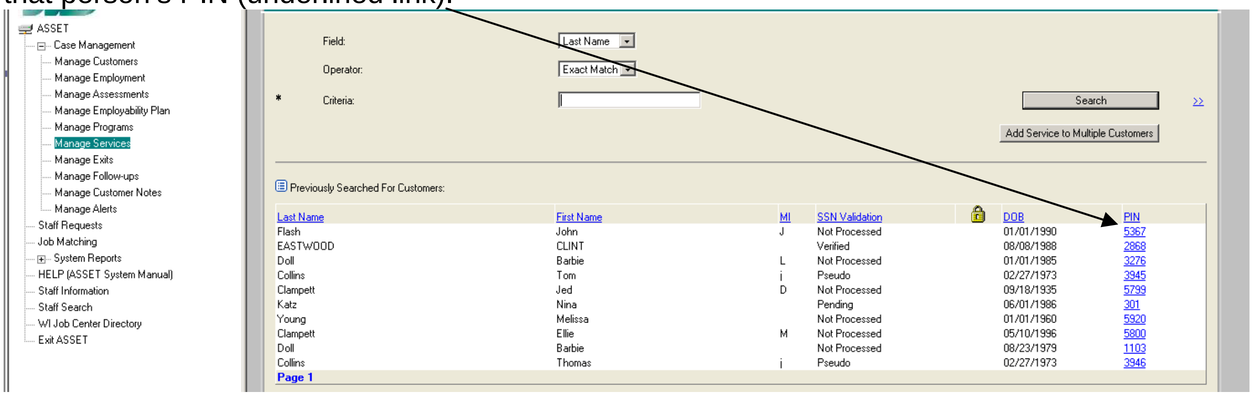


ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

Using the Services Function to Report New Services:
There are two ways in which a worker can enter services for a customer. If entering a single service for an individual, search for the customer the service is being reported for and click on that person's PIN (underlined link).



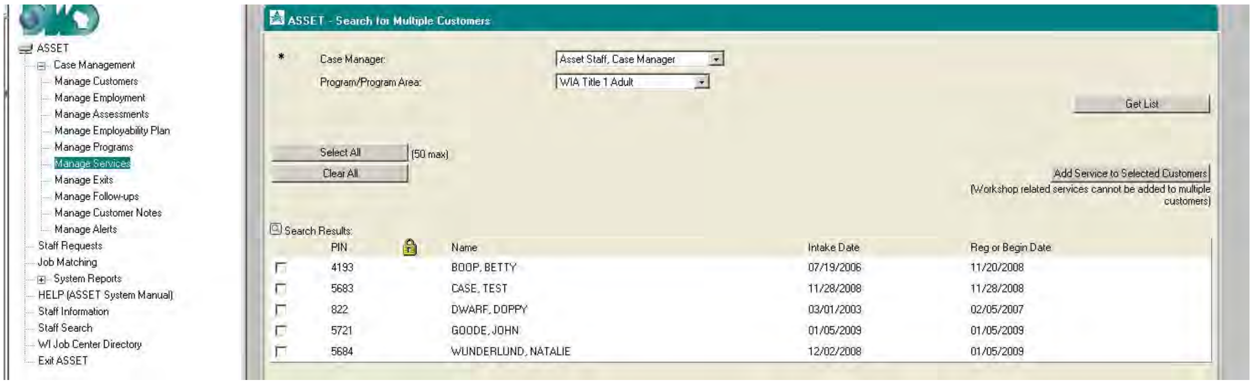
The page returned looks like this:

Clicking on the Add Service to Multiple Customer's button returns the Search for the Multiple Customer's page. Using this functionality a Case Manager can a Add Service to Multiple Customers records using the same program and fund source. The page returned looks like the one in this example.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____



Case Manager's who select the Program/Program Area of WIA Title I Youth will see additional functionality for posting of multiple services. The page displayed looks like this.

Next, click on the Get List button. The records returned are associated by the Youth Age Range that's selected by the case manager**.** Select the records for posting a service to by clicking on the checkbox located to the right of the PIN, or by clicking on the Select All button.

Then click on the Add Service to Selected Customers button. This returns the user to the Manage Services function for completion of the service information (as seen in 3-7, page 5). Once submitted, that service is recorded for each individual.

Note: The list for a case manager contains only those customers who have that worker listed as the case manager for that Program Area in Manage Programs.

Each of the Programs in which the customer is currently registered has its own section on the page. Since services may be reported only for Programs for which the customer is registered, the Summary Page presents these active Programs by section. For WIA Title 1, the Summary Page also lists all the Program Areas currently open for this customer. The page looks like this if more than one Program Area is open.

ASSET Users' Guide

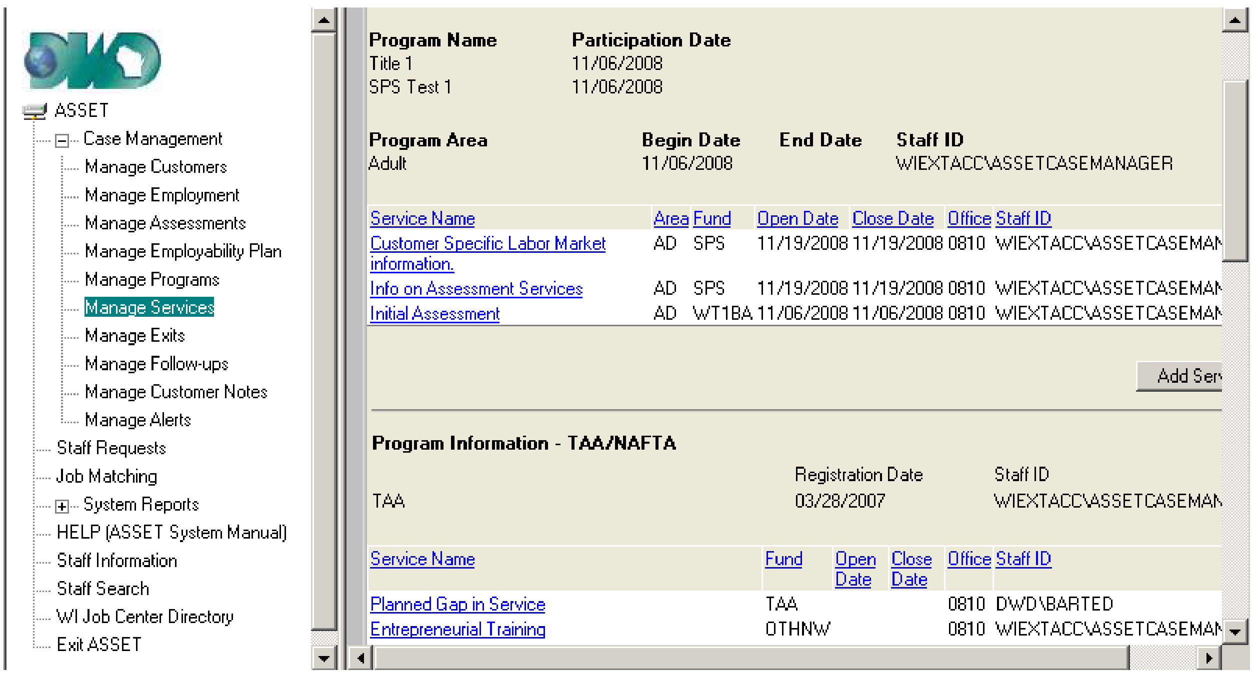
ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

A new service is reported by clicking on the Add Service button under the appropriate Program.

When a new service is added, there are two intermediate pages presented. The first one is where the worker designates the Service Type Category. Once that is selected, the second intermediate page is where the worker designates the Service that is being reported. These two intermediate pages are:

Service Eligibility 1 – This page changes dynamically, depending if more than one WIA Title 1 Program Area is open. For TAA, Title 3 Wagner-Peyser, and when only one Title 1 Program Area is open, the page has just one field for entry. If there are two or more Program Areas open, the worker must also select which Program Area the service is being reported.



Workers must select the appropriate Service Category from the dropdown menu. The Service Categories are:

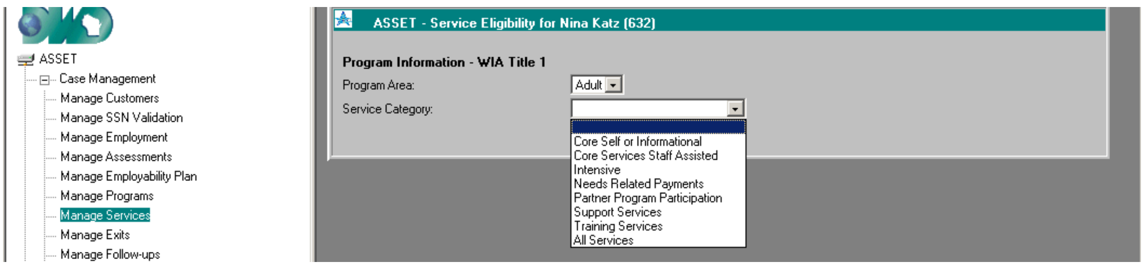
- Core Self or Informational Services
- Core Services Staff Assisted
- Intensive Services
- Needs Related Payments

Users' Guide

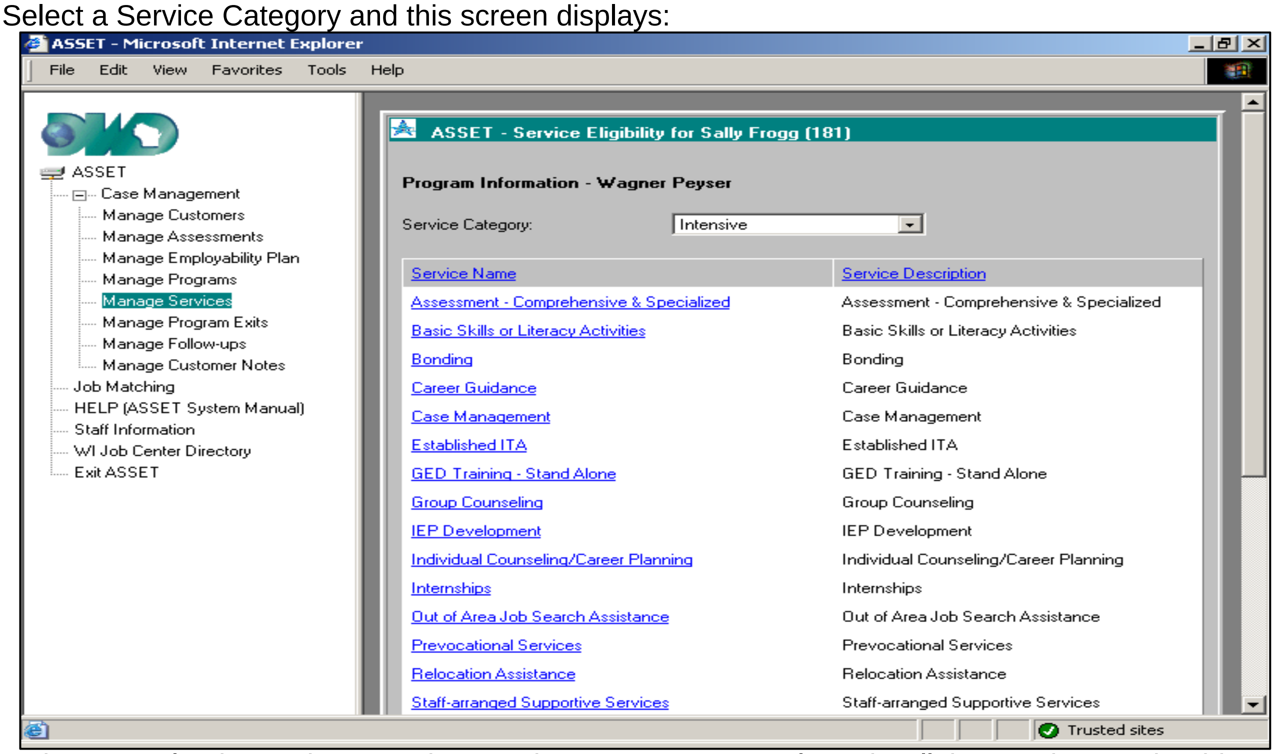
ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

- Partner Program Participation
- Support Services
- Training Services
- All Services



Select a Service Category and this screen displays:



In the example above, the Intensive Service Category was selected. All the Services under this category are listed. To select the service to be reported, click on the name of the Service link (underlined). For example, if IEP Development is the service to be reported, click once on this link.

ASSET Users' Guide

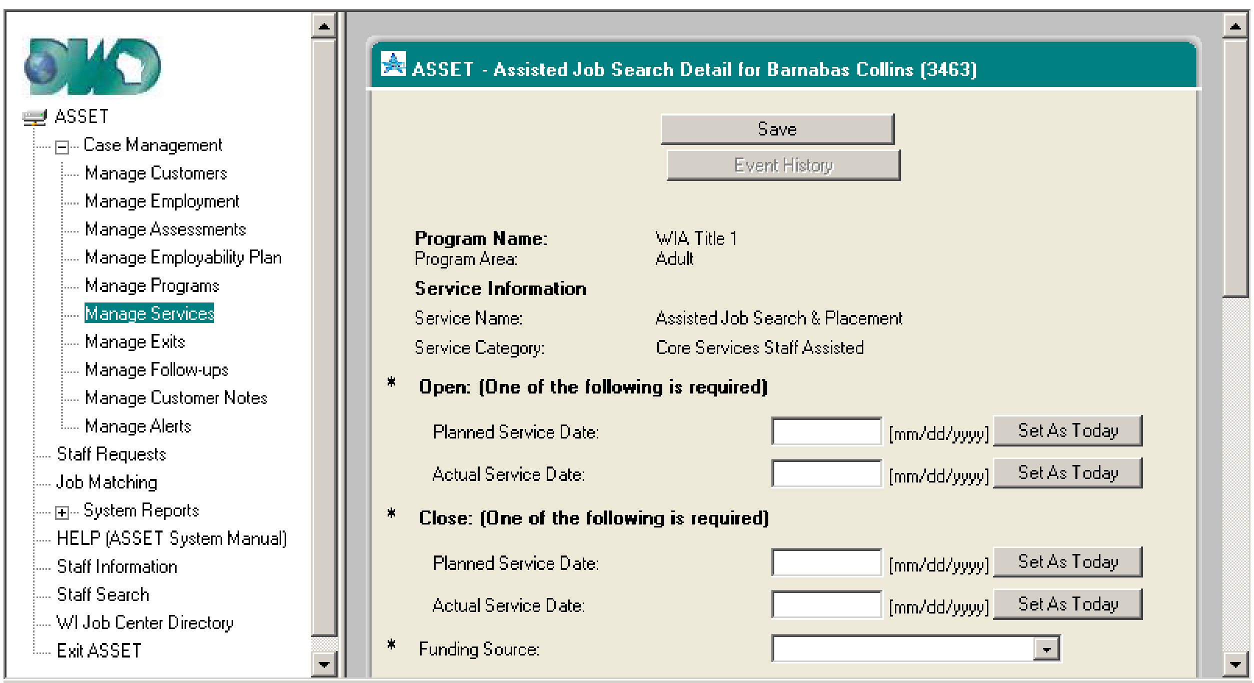
ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

Note: If it is determined that the service to be reported is not in the list of the Service Category selected, use the browser's Back Button. However, the worker is returned to the Service Summary page and must again click on the Add Service button.

The design of the Service Eligibility listing includes the name of the Service and a description. Workers should pay close attention to these definitions, as they have been expanded or re-defined to improve the quality of service reporting.

When the desired service is selected, clicking on the Service's underlined link opens the **Service Detail** page for that service. The Service Detail page consists of two parts – the upper portion is the same for all programs and services and the lower part dynamically changes based on what is entered in the top portion. The upper portion of the page is displayed on the next page. Note that the name of the Service is displayed at the top with the customer name and PIN as well as under the Service Information section.



The service dates entered are very important! The user needs to be aware that only Actual Service Dates (Open and Close) are used in program performance. Any service that has only a Planned Open and Planned Close are never counted as a service that was actually provided. Planned Open dates are just what it implies – a planned service. Until an Actual Open Date is entered, that service is regarded as never having started.

A Note about System Edits on the date fields: The Open and Close Dates may be either Planned or Actual. Workers may use a future date in the Planned Service open date or the Planned Service close date, and may backdate a planned service up to 15 days prior to the system date (today's date), but never before the Program registration date.

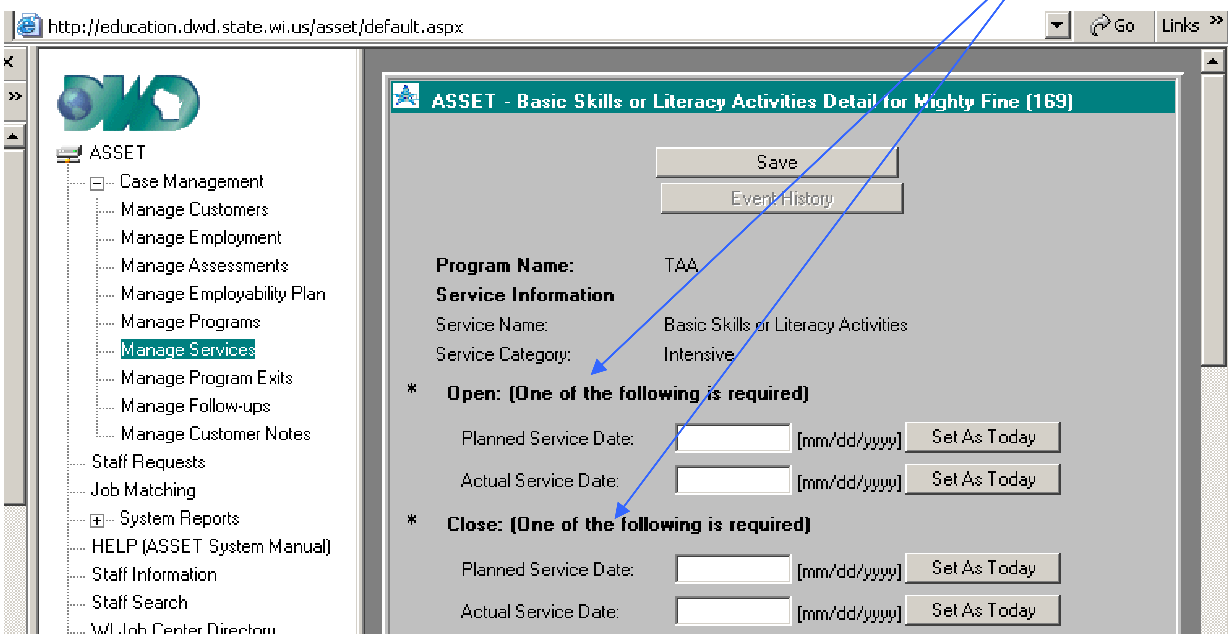
The Actual Service Open date also may be backdated up to 15 days, but never before the Program Registration date. Workers are never allowed to enter a future date in the Actual Service Open date field because the Actual Service Open date should be the date the service actually began or the activity was started. Workers cannot know what the Actual Service Close date is unless that day is today or in the past, therefore no future dates are allowed for Actual Close date. Workers may know that a service is planned to close in the future, but cannot know for sure that it actually occurs until that day arrives.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 ______MANAGE SERVICES______

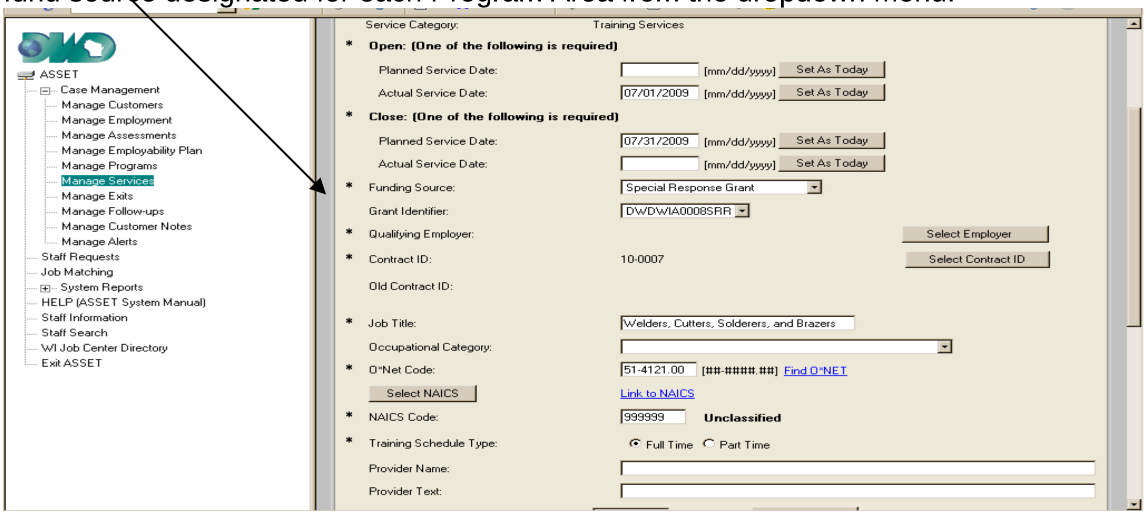
Service Detail Page – Upper Portion
The upper portion of the Service Detail page always displays in the same way. There are two required fields in this portion of the page. The fields on the page include the Open and Close Dates, for both Planned and Actual.



Field Definitions:
The Service Detail page input fields are defined as follows:

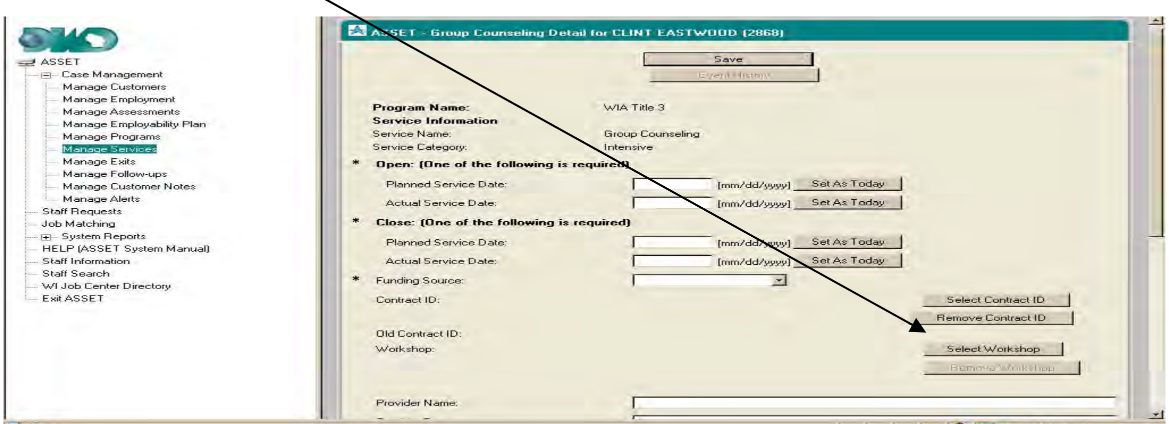
FIELD	REQUIRED	DESCRIPTION
• **Open – Planned Service Date**	Yes	The date the activity/service is planned to start.
• **Open – Actual Service Date**	Yes	The date the activity/service is actually started.
• **Close – Planned Service Date**	Yes	The date the activity/service is planned to end.
• **Close Actual Service Date**	Yes	The date the activity/service is actually finished.

Funding Source is another required field. Workers should ensure that they select the correct fund source designated for each Program Area from the dropdown menu.



A Grant Identifier and Qualifying Employer field appears if the Funding Source is; WIA Title IB Dislocated Worker, Special Response, or National Emergency Grant, or Statewide Set Aside. Or, if the Funding Source chosen is Special Programs. They are designated (*) as required fields and are entered by Central Office staff.

The Select Workshop button is used to schedule a customer to attend a specific workshop. Click on the Select Workshop button.



The page displayed looks like this:

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

There are 5 WIA Title 3 services that can be used to schedule the customer to attend specific Workshops. The services are: Group Counseling, Keytrain Workshop, Workkeys-Locating Information Assessment , Workkeys-Math Assessment, and Workkeys-Reading Assessment.

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

The Field Descriptions are:

FIELD	REQUIRED	FIELD DESCRIPTION
• **Funding Source**	Yes	Identifies the source of funding that pays for the specific service being provided.
• **Grant Identifier**	Yes for Dislocated Worker and Special Program's	This field has a cross-edit with the Funding Sources. Here's how it works. If Special Response Grant is the Funding Source, only SRR and STW grants are available in the Grant Identifier field. If National Emergency Grant (NEG) is the chosen Funding Source, only NEG grants are available in the Grant Identifier field. If Special Programs is the chosen fund source then a pre-entered Grant ID is available. This field requires a response in order to save the page. Only area's with an approved grant ID will be able to complete the service.
• **Qualifying Employer**	Yes for Dislocated Worker	The name of the Employer that the participant was dislocated from.
• **Contract ID** (Select Contract ID)	Yes	Tab with pop-up window that lists available Contract number given for approved grants for a WDA.
• **Old Contract ID**	No	Display-only field. Former Contract ID
• **Select Workshop**	No	Identifies workshops and used for customer scheduling. Once Saved the Remove Workshop button is available and can be used to cancel/delete from workshop.
• **Provider Name**	No	The name of the agency that is providing the service.

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

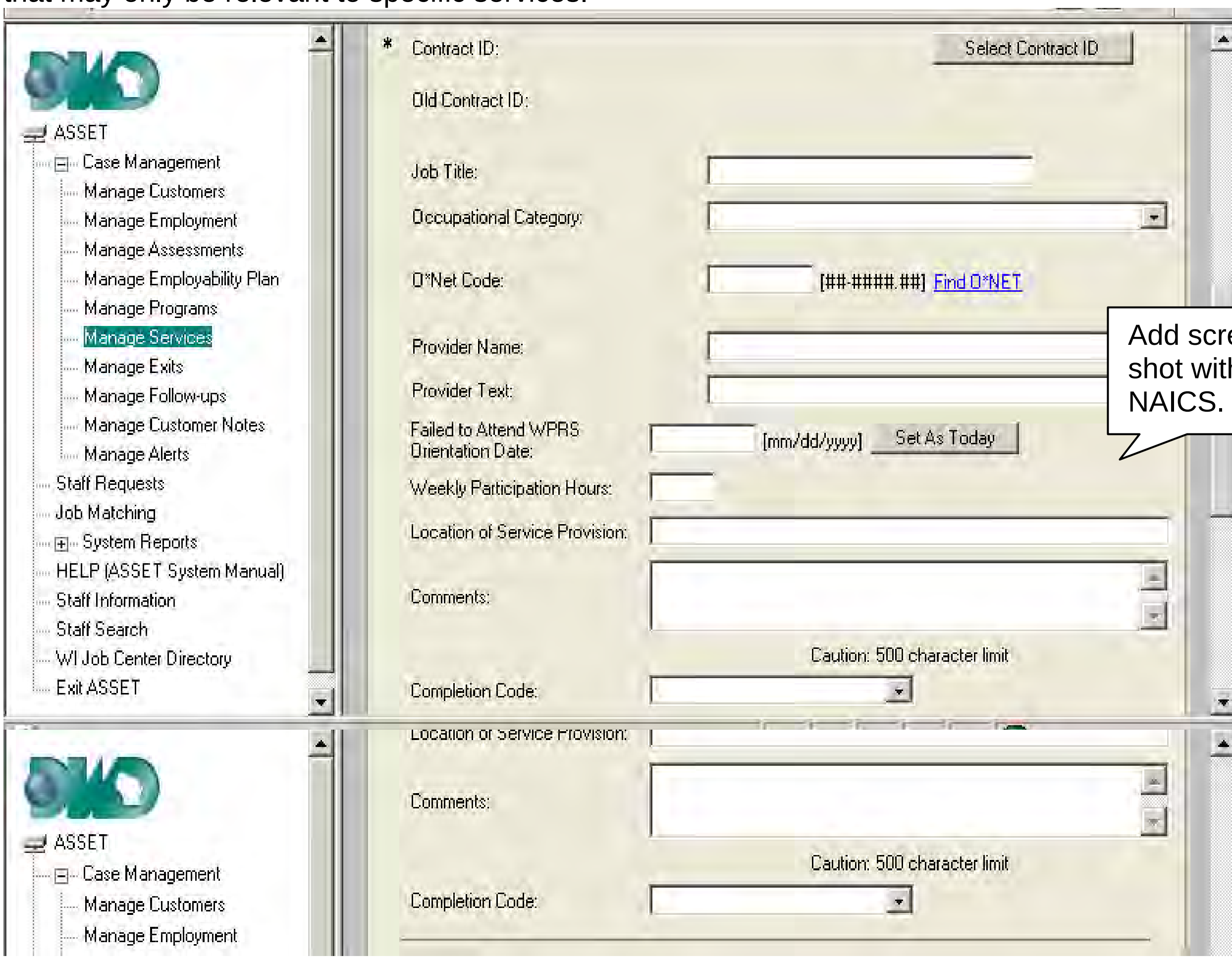
FIELD	REQUIRED	FIELD DESCRIPTION
• **Provider Text**	No	Information related to the service provider.
• **Remove Contract ID**	No	Tab that will remove Contract ID information when entered in error.
• **Job Title** (Training Services Only)	Yes	Name of the job or occupation the customer is receiving training under.
• **Occupational Category** (Training Services Only)	Yes	Select the Occupational Category that corresponds to the Job Title.
• **O'NET Code** (Training Services Only)	Yes	The O*NET code is system generated once the occupational category is selected. A worker can click the Link to O'NET to access additional codes if preferred.
• **NAICS**	Yes/No	The NAICS code is system generated when a worker clicks on the Link to NAICS . A response is required when the service type selected is a Training Service.
• **Training Schedule Type**	Yes	Select whether the training is either part or full time training.
• **Provider Name**	No	The name of the agency that is providing the service.
• **Provider Text**	No	Information related to the service provider.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

Service Detail Page – Middle Section
The middle section of the Service Detail page also displays for every service, but contains fields that may only be relevant to specific services.



Add screen shot with NAICS.

ASSET CASE MANAGEMENT FUNCTION

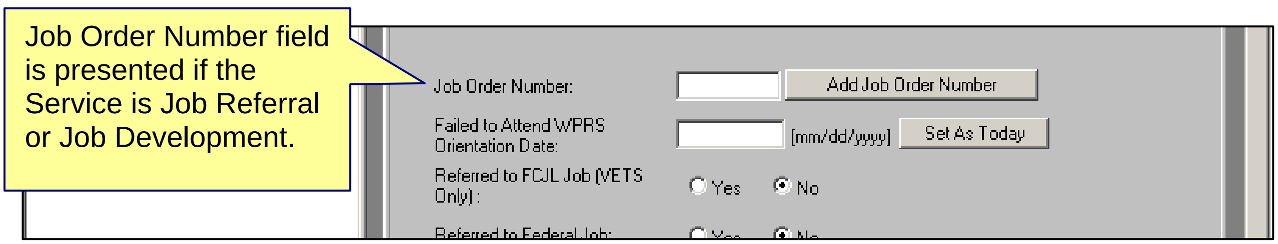
3-7 _____MANAGE SERVICES_____

FIELD	REQUIRED	FIELD DESCRIPTION
• **Failed to Attend WPRS Orientation Date:**	No	The date the individual failed to attend his/her WPRS Orientation.
• **Weekly Participation Hours**	No	Text field – an estimate of the time commitment the customer should expect for that activity.
• **Location of Service Provision**	No	Text field – Gives the Case Manager a place to put an address, room number or other information that will assist in directing the customer to the right location.
• **Comments**	No	Text field – Provides the customer with additional information or instructions.
• **Referred to FCJL Job (Vets Only)**	Yes	Radio button – Identifies if the employer is listed on the Federal Contractor Job Listing
• **Referred to Federal Job**	Yes	Radio button – Identifies if the customer was referred to a Federal job.
• **Completion Code**	Yes	Dropdown – Status of a Service at completion.

ASSET CASE MANAGEMENT FUNCTION

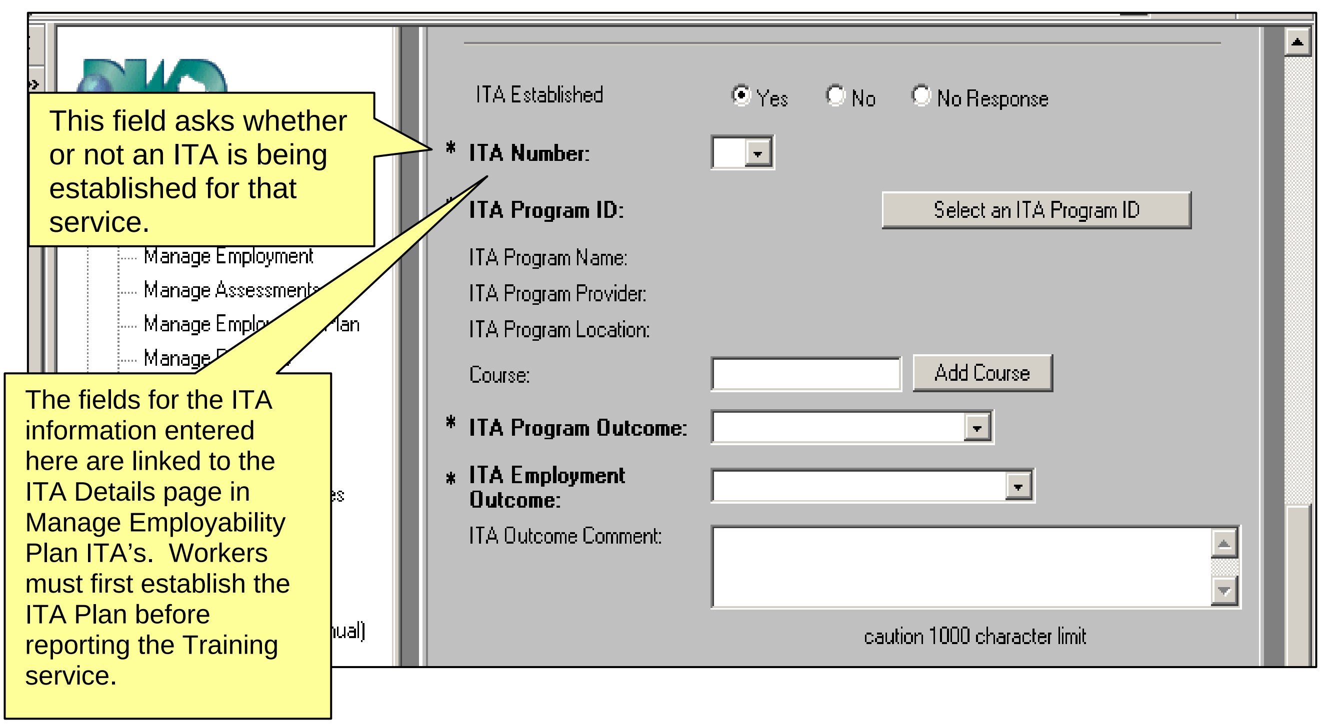
3-7 _____MANAGE SERVICES_____

Service Detail – Lower Portion
The lower portion of the Service Detail page will vary in structure and data fields depending upon the information entered in the upper portion of the page or the type of service being reported. The lower portion of the Service Detail may include the following fields:



Note: Multiple referrals may be reported by entering the order number and clicking on Add Job Order Number for each referral. Once saved, multiple services are recorded.

When the service being reported is training-related, the following questions are presented.



3-7 MANAGE SERVICES

If the ITA Established response is yes, the page refreshes and the other fields related to the ITA appear.

Select an ITA Program ID from the list of Eligible Training Providers by clicking on the Select an ITA Program ID button. This information is organized by WDA. Once selected, the ITA Program ID, Name, Provider and Location automatically display.

Workers have the option of listing the course or courses that are being covered by the ITA. This is a text field that is entered for each course. Clicking on the Add Course button displays the course and opens the field for addition of another course.

The ITA Program Outcome and ITA Employment Outcome fields are required. There are options in the dropdowns to indicate that the person is pending these outcomes if not yet completed with the training. When the Training service is completed, the worker should remember to change the status on this page from Pending to reflect the appropriate outcome.

The fields on the ITA part are defined as follows:

FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Number**	Yes	The worker must select the ITA number from the dropdown. The numbers available are those already established on the Manage Employability Plan – ITA Tracking Overview tab.
• **ITA Program ID**	Yes	This dropdown is a list of all approved Training Programs on the Eligible Training Provider List. The list is sorted by the WDA (the first two numbers of the course). The WDA number is the one that approved the specific course as eligible for ITAs. The same course may be listed more than once (under each WDA that approved it). Because customers may opt to attend Training Programs outside of the WDA in which they live, workers may have to search this listing for the appropriate course number under that target site WDA. For out-of-state providers, users may need to contact DET for assistance.

ASSET CASE MANAGEMENT FUNCTION

3-7 MANAGE SERVICES

FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Name** • **ITA Provider** • **ITA Location**	N/A	These fields fill automatically based on the ITA Program selected.
• **Course**	No	The worker may list the specific courses within the Training Program that this customer will take. It may be important if the ITA covers only a portion of the courses offered under a comprehensive Training Program. Customers can be given a printed copy to clearly show the specific courses to be paid via the ITA.
• **ITA Program Outcome**	Yes	The worker must enter the appropriate response. • **Pending** means the customer has not yet started or currently is in the training program • **Not Completed – Failed** means the customer could not complete the level of work in the training and received a failing grade • **Not Completed – Dropped Out** means the customer did not complete the entire course • **Completed** means the customer finished the Training Program or the goals of the Employability Plan for the training. • **ITA Withdrawn** Only the Completed outcomes will be used for evaluation of the Training Program.

FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Employment Outcome**	Yes	The worker must complete the appropriate response: • **Pending** means the customer has not yet started or currently is in the training program • **Employment – Training Related** means that the participant has obtained a job related to the training program • **Employment – Not Training Related** means the participant has obtained a job but in an occupation not related to the employment • **No Employment** means that the participant has not found employment. The responses in this field will be used to evaluate Training Programs for future eligibility as an Eligible Training Provider. **Workers should change this response if the customer later obtains work that is training related.**
• **ITA Outcome Comments**	No	Text field for narrative comments regarding the outcomes shown.
• **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.

The By Block portion of the Service Details page is the same as elsewhere in ASSET. Except for a few specific services, workers who have correctly set their Staff Type and Office Code on the Staff Information page will rarely need to enter data in any of the fields on By Block portion of the page.

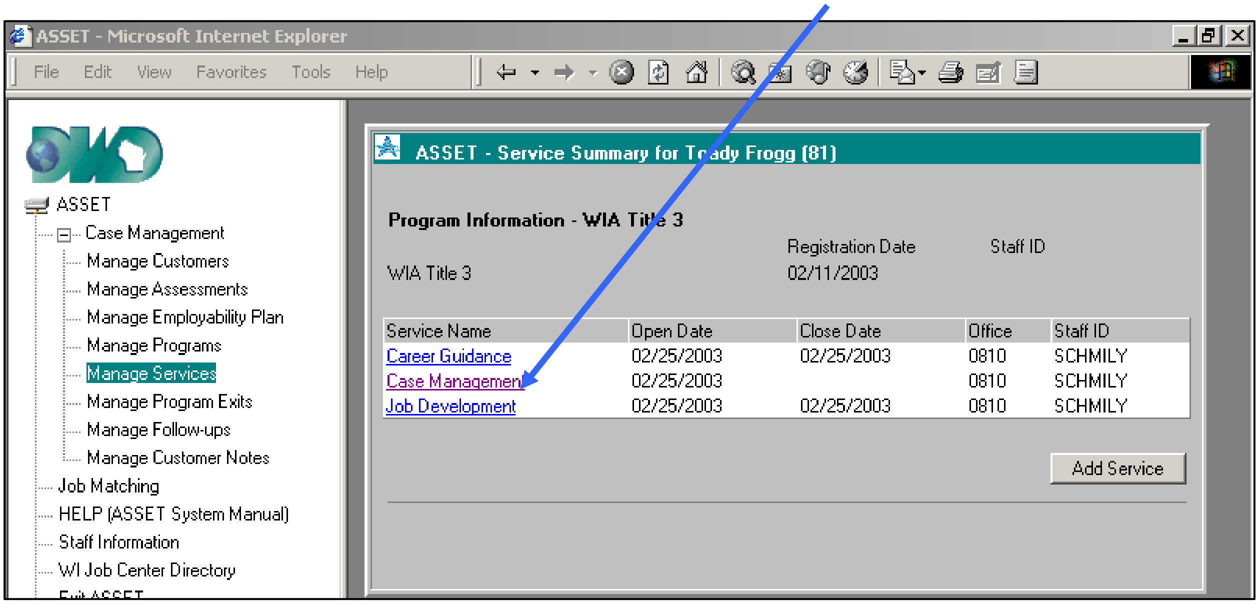
ASSET CASE MANAGEMENT FUNCTION

3-7 MANAGE SERVICES

Using Manage Services to update or modify a reported service:
The Manage Service function allows workers to update or modify a reported service only if the Program is still active.

Note: Workers will not be allowed to exit a customer from a Program if there are open services for that Program. Additionally, a customer's Program Area should not be ended if there are open services for that Program Area. Placing an End Date in Manage Programs will prevent you from closing the services. The correct order for closing out a case is Close Services, End Program/Program Area, and finally Exit Program.

To return to the Service Detail page for an existing service (either to modify it or to close the service), the worker needs to click on the Service link on the Service Summary page. In this example, three different services were reported under WIA Title 3. If the worker wanted to end Case Management services for the customer below, a single click on the Case Management service link opens the detail page for that existing service.

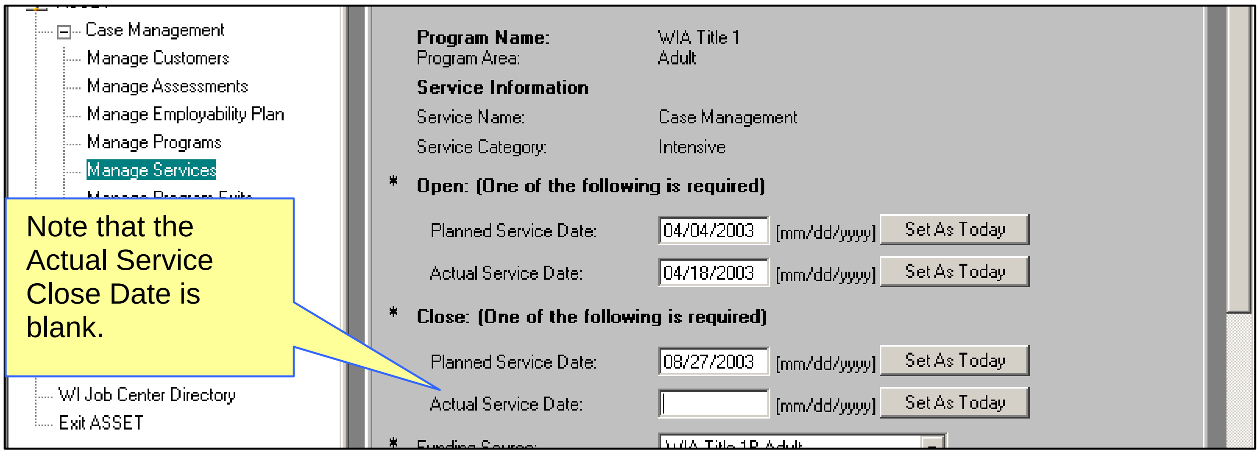


ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____

The upper portion of the Service Detail page for the existing Case Management service looks like this:



To close this service, the worker must enter the Actual Service Date in the Close section and click on the SAVE button.

If the worker wished to only change information about the service, such as changing a Funding Source or adding a Provider Name, simply make the change(s) and click on SAVE, and the service is updated.

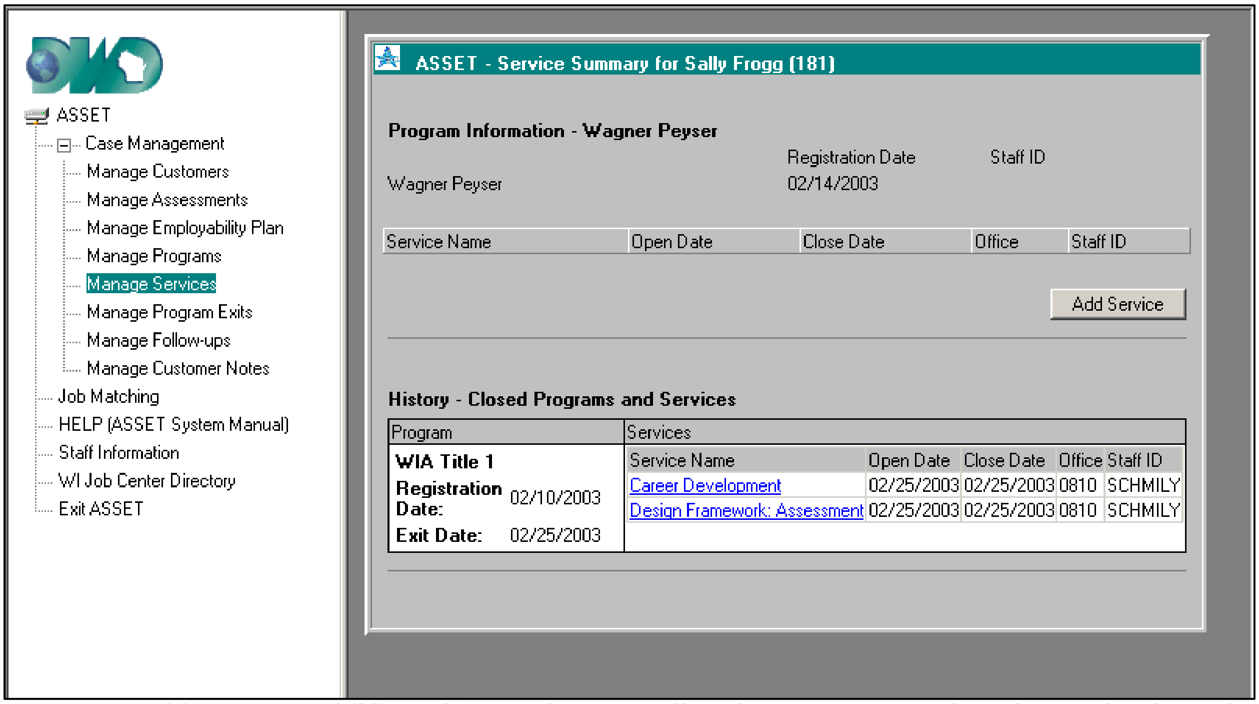
If the service is to be kept open longer, meaning the Planned Service Close Date is to be extended, just make that change to the date and click on the Save button.

> **Note: There is a system edit that prevents workers from creating a Planned Service Close Date that is more than four years beyond the Actual Service Open Date. In very rare circumstances a service that is kept open continuously for more than four years will require special reporting by ending the first service and opening a new service starting on the same day as the first service ended.**

Using Manage Services to view historical services:
While a customer is in a current period of registration, all reported services are displayed for that Program episode. When a customer is exited from a Program, all the services reported for that Program are moved to a historical point of reference at the bottom of the page. Here's an example of an Exited WIA Title 1 customer, whose services during that period of Program Registration were moved to history.

ASSET CASE MANAGEMENT FUNCTION

3-7 _____MANAGE SERVICES_____



ASSET provides some additional information regarding the Program Registration and Exit, and lists all the services provided during that time period for that Program. Workers may view the services that were reported, but cannot make changes to this information.

To view the services listed in the History - Closed Programs and Services section, the worker needs to click on the Service Name link as indicated above. This will open the Service Details page.

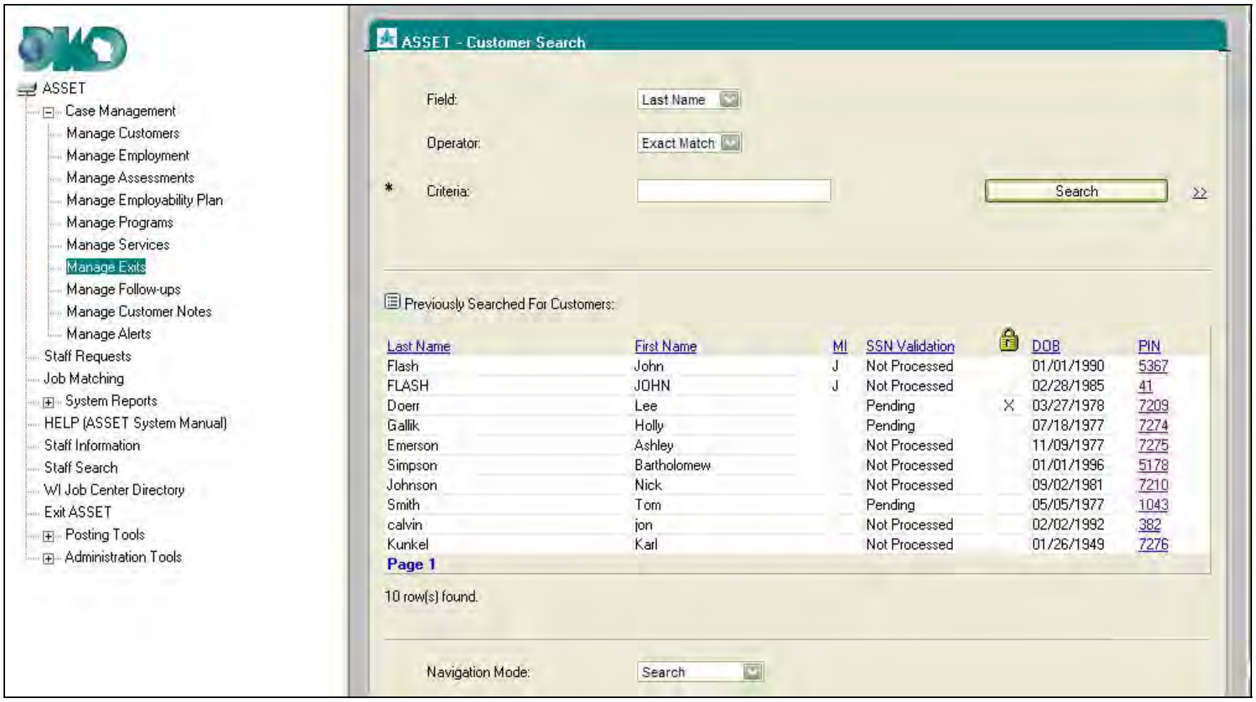
Return to index – Click here

ASSET 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.

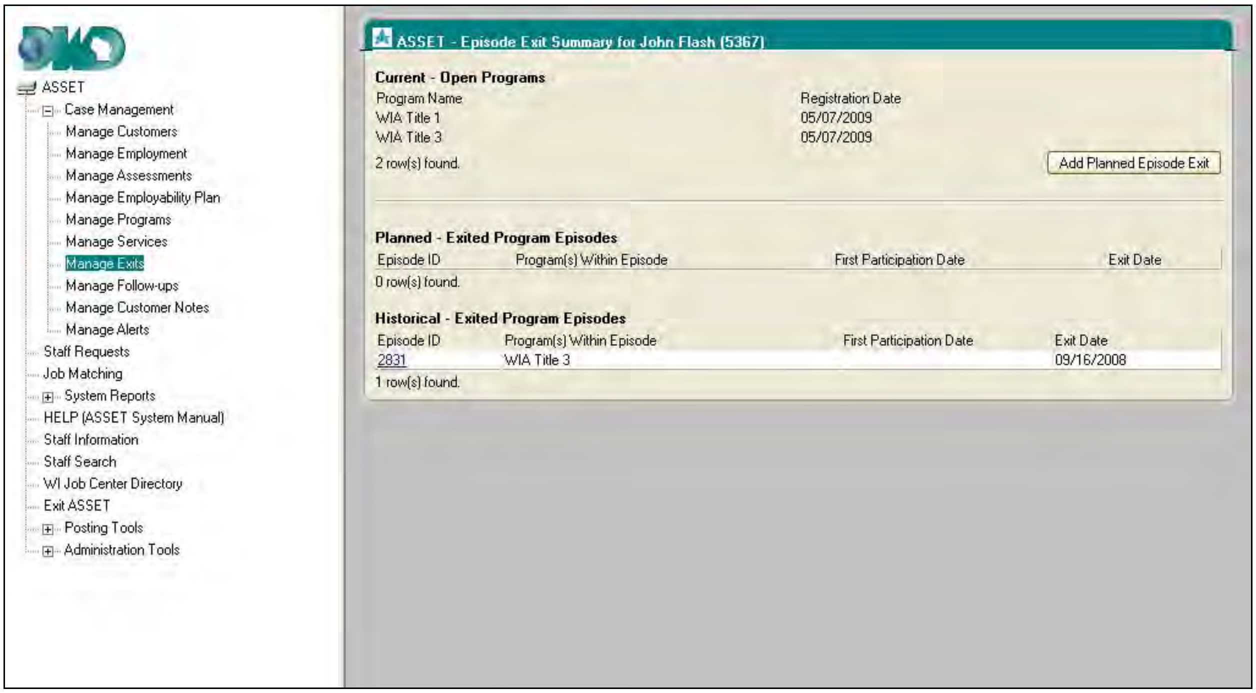


When a worker clicks on the PIN, ASSET automatically retrieves the customer's Episode Exit Summary. The summary returned displays the Current – Open Programs, the Planned Exited Program Episodes, and the Historical Exited Program information as shown in the following example.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____



Planned Exits

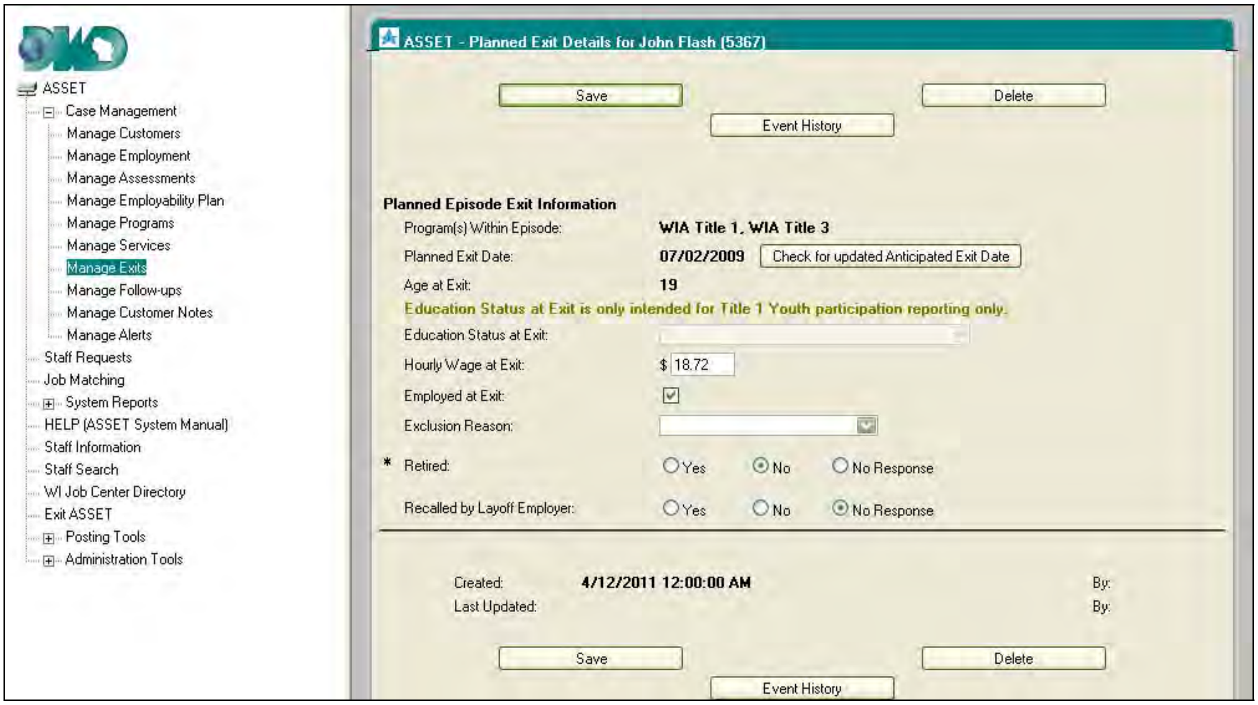
A Planned Exit can be created when there is an Open Program with a Registration Date present in ASSET and the **Add Planned Exit Episode** button is available on the Episode Exit Summary.

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_____

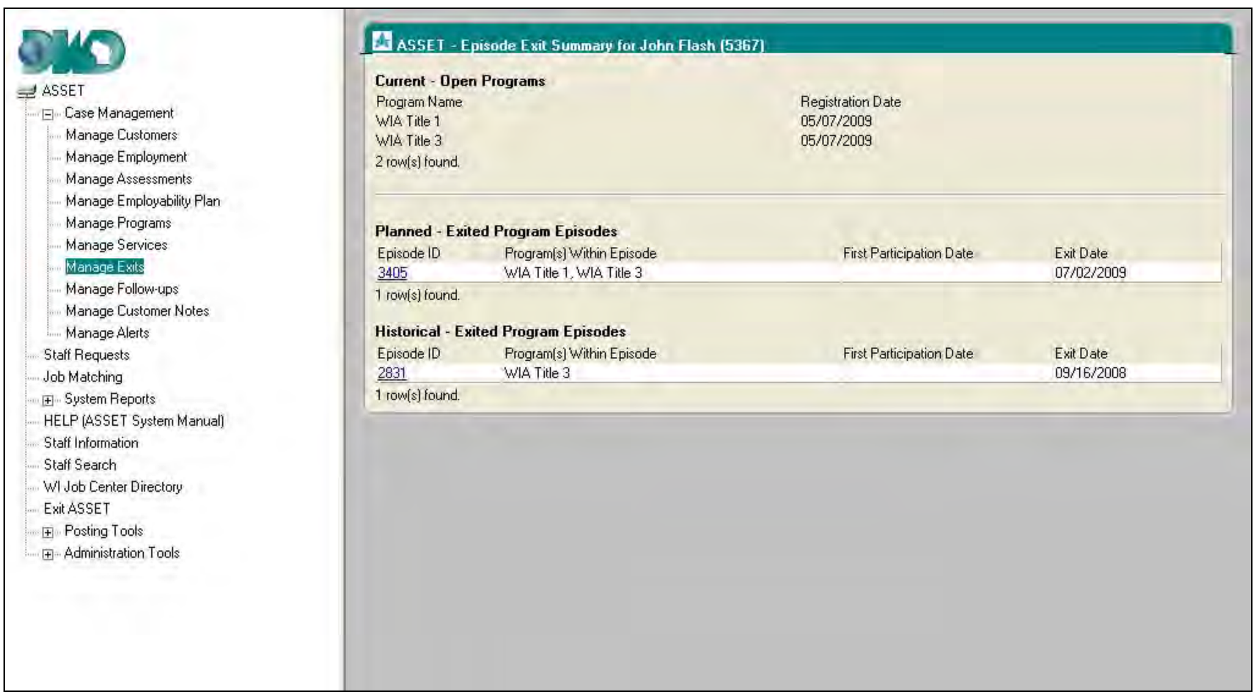
FIELD	REQUIRED	DEFINITION
Education Status at Exit	No	Dropdown field in which users can select the appropriate response that identifies the participant education status at the time of the Title 1 planned exit. If a system-planned exit is generated (soft planned exit), the education status will be the 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:

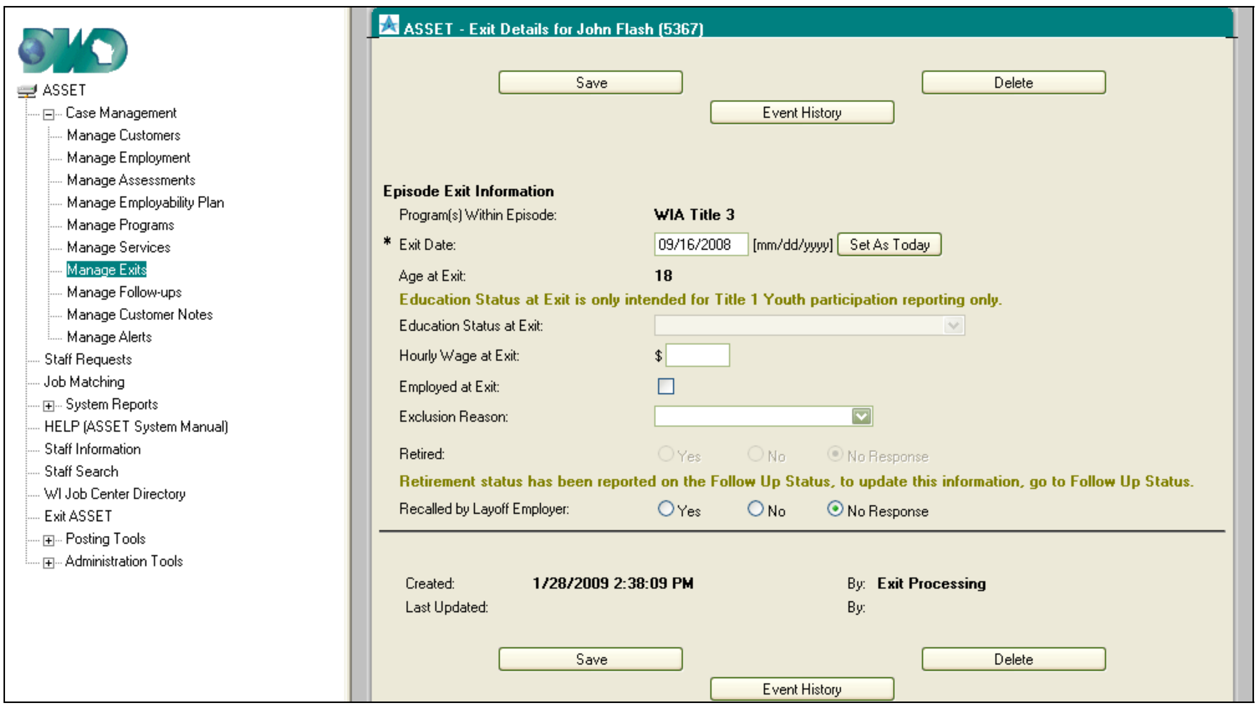
PROGRAM	CONDITIONS
WIA Title 1, Title 3, TAA, or any Job Center Partner Program	A system exit is generated when: • A participant has not received a service funded by U.S. DOL Programs or funded by a partner program for 90 consecutive calendar days. The Exit Date is the last day of service.

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.

ASSET CASE MANAGEMENT FUNCTION

3-8 _____ MANAGE EXITS_____

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

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The Manage Follow-ups function in ASSET tracks information about a customer who has a system generated exit.

The information gathered in Manage Follow-Ups is organized into three different areas:

1. **Follow- up Credentials** – where workers report that a certificate/ credential was earned during participation or after exit. (See WIA Policy Update 06-07).
2. **Follow-up Status** – where workers report employment for the first, second and third quarters after exit. The reporting quarters are listed at the top of each tab.
3. **Follow-up Services** – where workers document the services that are provided to a customer in the 90 days preceding program exit and after program exit.

The Manage Follow-Ups function is launched from the Menu Tree. Clicking on this option opens the ASSET Customer Search page. Workers will need to perform a search to find the customer about whom a Follow-Up is being reported. The search is done by entering the Search or Advanced Search criteria for the customer.

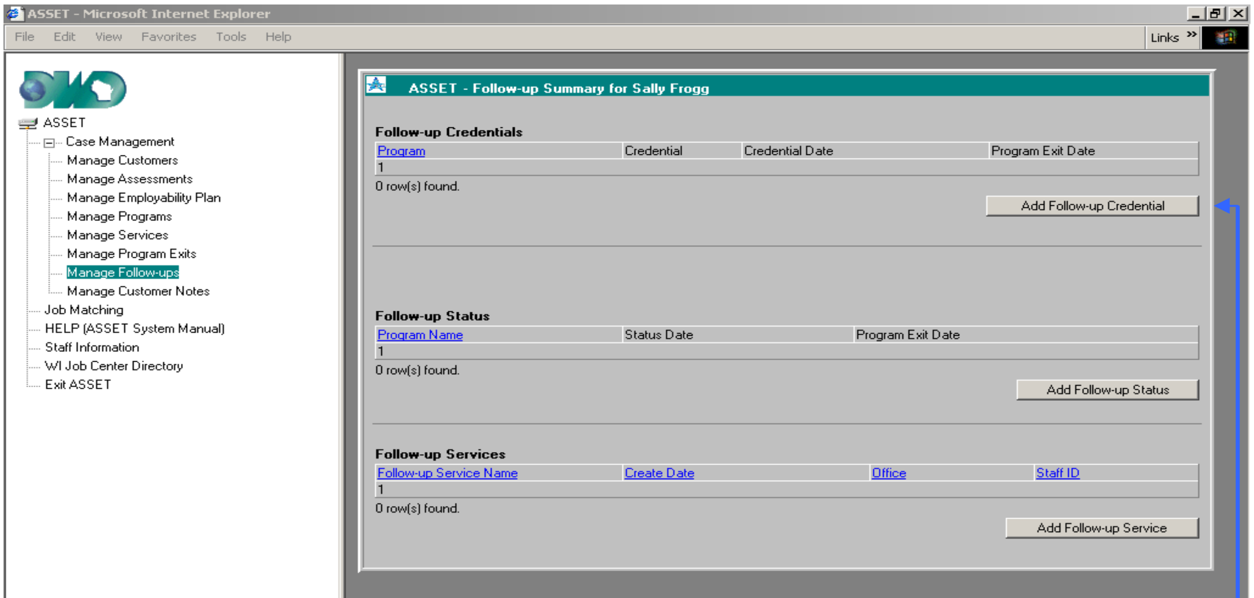
The first page displayed is the Follow-Up Summary for the selected customer. This page is divided into the three sections mentioned above – Credentials, Status and Services. Under each section, any item with historical information on the database will have that information listed.

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

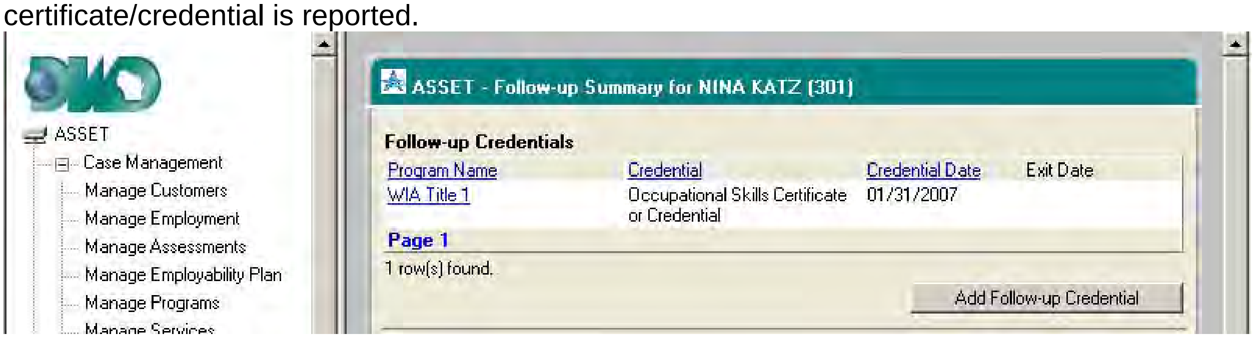
The Follow-up Summary Screen looks like this:



Follow-Up Credentials

The Credential section of the Manage Follow-Up function is the location where workers report the certificate/credential attainment. This section is available to workers at anytime during the individual's participation in the program

Workers add certificate/credential information by clicking on the Add Follow-Up Credential button. This takes the worker to a screen that displays the programs for which a certificate/credential is reported.

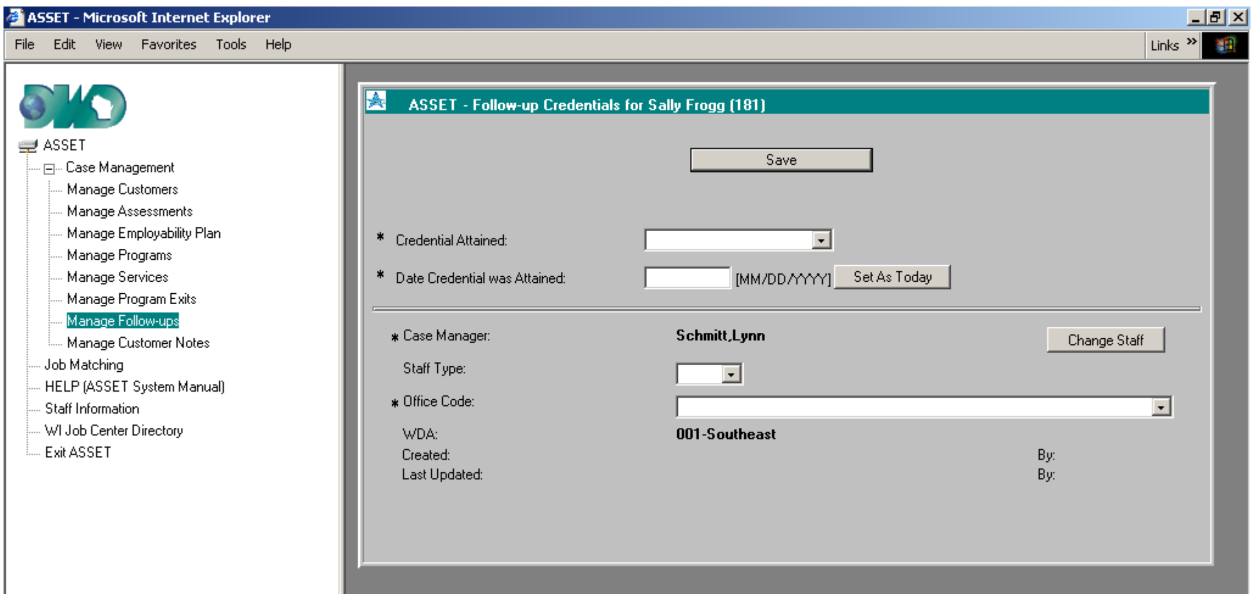


Certificates/credentials, can be reported for any program once a program registration is present in ASSET. Clicking on the program link (underlined) will open the Credential screen. It looks like the one on the next page.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____



This page includes only a few fields of information. They are:

FIELD	REQUIRED	DESCRIPTION
• **Credential Attained**	Yes	This field is entered from a dropdown menu. Valid values are: • High School Diploma • GED or HSED • AA or AS Diploma/Degree • BA or BS Diploma/Degree • Occupational Skills License • Occupational Skills Certificate or Credential.
• **Date Credential was Attained**	Yes	The date the certificate/credential was attained. This date cannot be a future date.

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

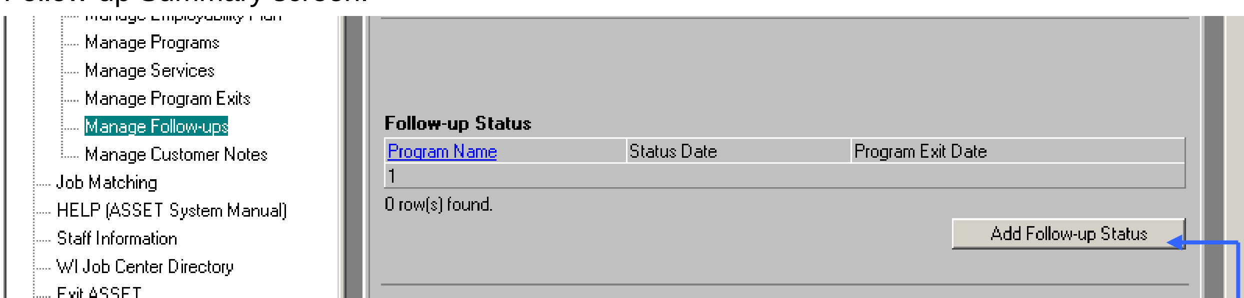
FIELD	REQUIRED	DESCRIPTION
• **Case Manager**	Yes	The name of the Case Manager, defaulted from the logon.
• **Staff Type**	No	Blank unless an LVER or DVOP (Veteran Staff)
• **Office Code**	Yes	Defaults to the Office if the User logged on, but may be changed if not correct.

Clicking the Save button returns the user to the Follow-Up Summary page where the newly reported credential will appear on the historical list.

Follow-Up Status

The Follow-Up Status section is used to record post-Exit information about employment or WIA Title 1 Youth outcomes.

When viewing the Follow-Up Summary screen, the Status section appears in the middle of the Follow-up Summary screen.

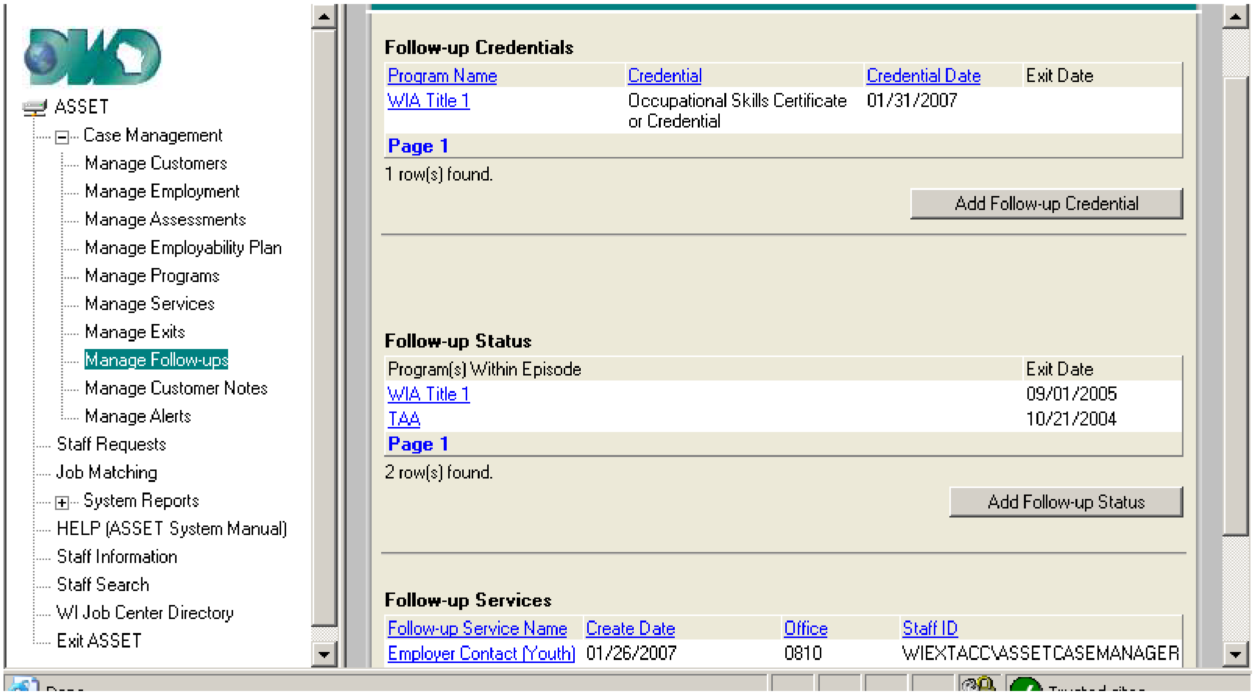


Follow-up Status information can be reported for each program the customer received services from. Each program will be listed in the Program Name column. Workers may select that record by clicking on the underlined link in the row and add the appropriate quarterly follow-up data as appropriate. If no Follow-Up Status exists, the worker may click on the Add Follow-Up Status button.

The first screen that displays is the Programs Eligible for Follow-Up. ASSET determines this by checking to see if there has been an Exit completed for this customer. All programs must have been exited for a Follow-Up Status to be reported. This is the screen displayed when an exit has occurred.

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

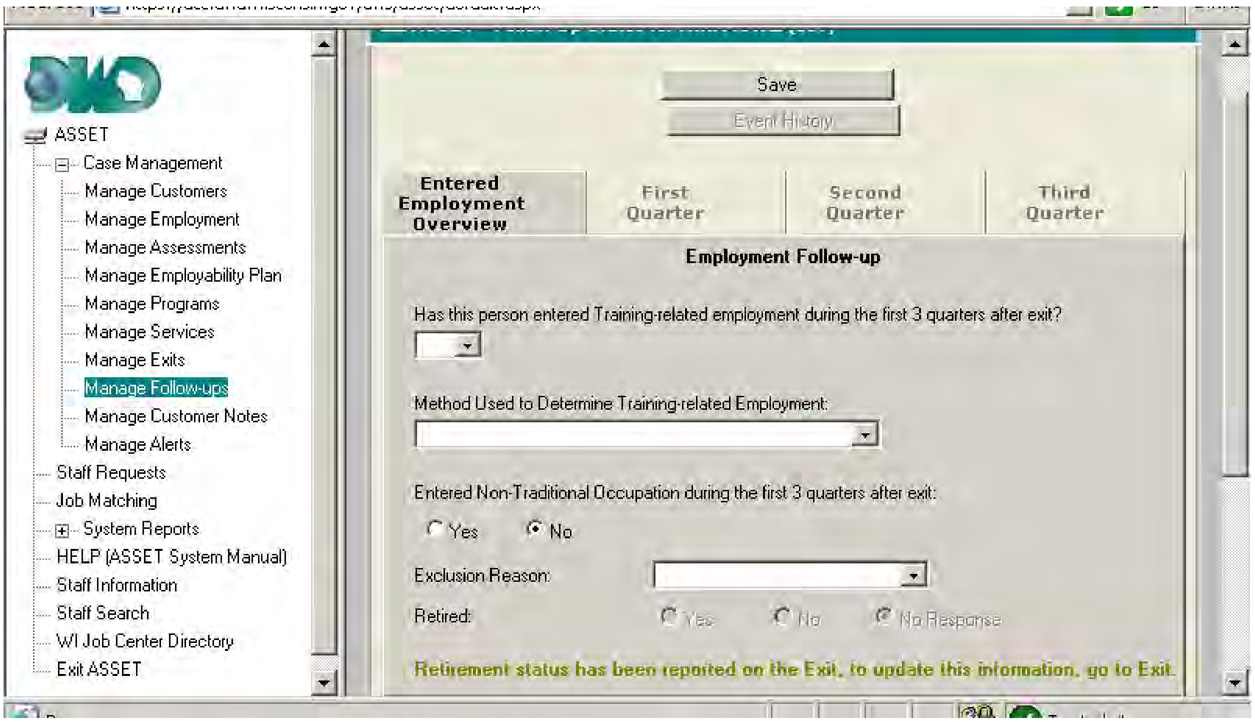


When the customer is eligible for Follow-Up status reporting, click below the Program(s) Within Episode link (like the one highlighted in the example above) and it will open the Follow-Up Status screen. It looks like this:

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____



Tab 1: Entered Employment Overview

The information collected on this screen may be updated at any time.

The fields on the Entered Employment Overview tab are:

FIELD	REQUIRED	DESCRIPTION
• **Has this person entered Training-related employment during the first three quarters after exit?**	No	Dropdown box with the following options: • Yes • No Note: Once a Yes response is saved, only staff with JCS Admin access can change the selected response.

ASSET CASE MANAGEMENT FUNCTION

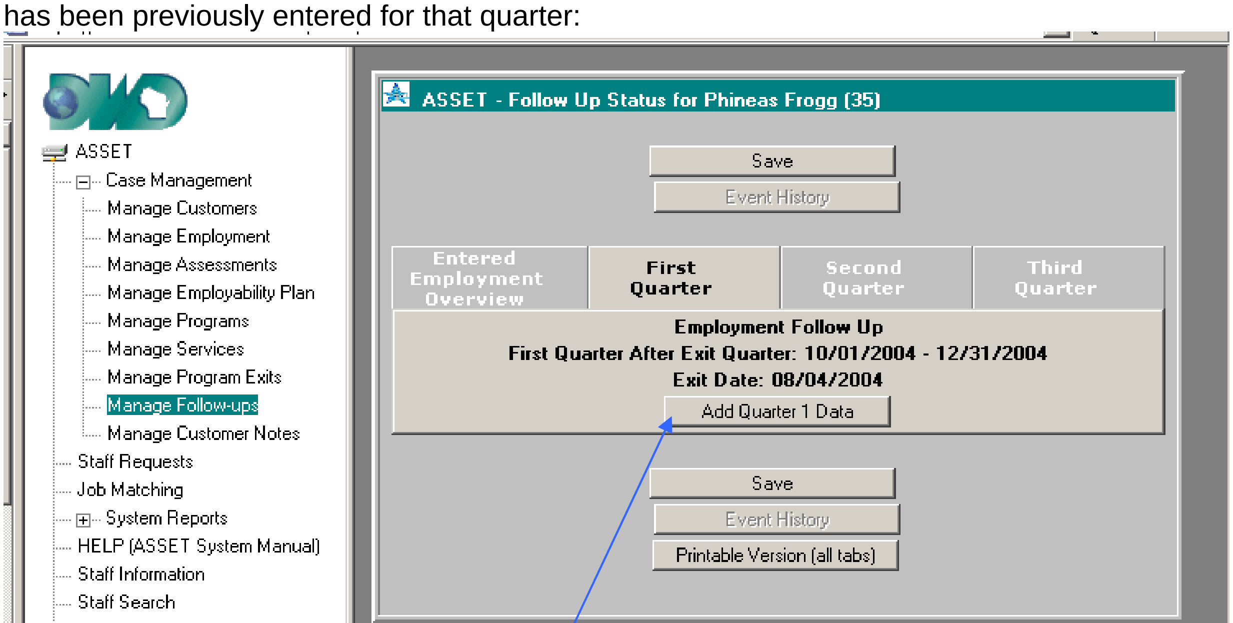
3-9 ____MANAGE FOLLOW-UPS____

FIELD	REQUIRED	DESCRIPTION
• **Method Used to Determine Training-related Employment:**	No	Dropdown box with the following options: • Compared occupation code of the training to job • Compared industry with the occupation of the training • Other appropriate method
• **Entered Non-Traditional Employment During the First Three Quarters After Exit**	No	Yes/No radio button to indicate if this person has entered a non-traditional occupation based on WIA policy definition
• **Exclusion Reason**	No	Dropdown box with following options (used for performance exclusions). This field is grayed out if a response was entered and saved on the Exit screen. • Incarcerated/Institutionalized • Health/Medical • Deceased • Family Care • Reservist Called to Active Duty • Relocated to Mandated Residential Program (Youth Only)
• **Retired**	Yes	Radio Button. Select either Yes or No to reflect the customer status at follow-up. The No Response is a system default button only. This field is grayed out if a response was previously entered on the Exit screen.
• **Recalled by Layoff Employer**	Yes	Radio Button. Select either Yes or no to indicate if the participant at follow-up was recalled by the employer/agency that they were laid off from at the time of TAA participation.

3-9 ____MANAGE FOLLOW-UPS____

Tab 1, 2, 3, First Quarter, Second Quarter, and Third Quarter.

When the worker clicks on any of the other tabs, the following interim screen appears if no data has been previously entered for that quarter:



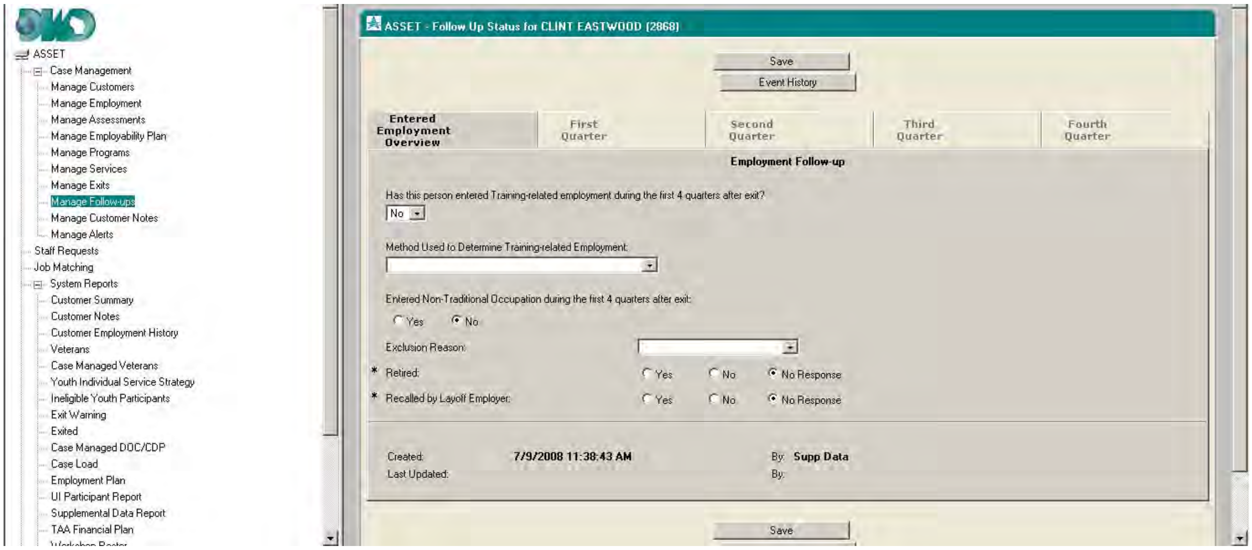
When a worker clicks on one of the Quarter tabs, the information appears in bold print. ASSET prevents data entry on the tab before the first day of the After-Exit quarter. Workers may want to wait until the end of the quarter to get and report the most accurate information available for the After-Exit quarters.

Click on the appropriate Add Quarter Data button and the data entry screen displays and looks like the one on the next page.

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____



The first section is **Youth Status** and is used for the WIA Title I Youth Program. All Youth exits must have one of the responses selected depending on the youth status **at registration**, i.e. Younger Youth/Older Youth. These fields are used for WIA Title IB Performance Measures, so it is important to complete this field. Staff should ensure that the placement reported corresponds to the youth program.

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The Field Descriptions are:

FIELD	DESCRIPTION
• **Youth Placement/Retention**	Dropdown menu includes the following options: • Entered post-secondary education • Entered advanced training • Entered Military Service • Entered a qualified apprenticeship

The Second section is used to identify the **Employment Status**. The fields for data entry are:

FIELD	DESCRIPTION
• **Employment Status**	Yes or No Radio buttons. Identifies whether or not the person was employed at anytime during this quarter.
• **Supplemental Data Status**	Has two values – Necessary or Not Necessary, and defaults to Not Necessary. This field is updated by a batch job each quarter and will be changed to "Necessary" if no wages are found for the client on the UI Wage file. This field is updatable only by an Administrator level staff.

The Third section is the **Supplemental Employment Information for Federal Reporting**. Currently the information recorded is only used for Title I. The fields for data entry include:

FIELD	DESCRIPTION
• **Total Wages Paid in Quarter from Supplemental Employment**	Numeric Text field to indicate the total wages earned by this individual in the calendar quarter being reported. This can be actual (from check stubs) or a calculated

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

FIELD	DESCRIPTION
	amount. (Response not necessary for performance.)
• **Out of State Employment**	Yes or No Radio buttons. A Yes response indicates that the employment is located outside of Wisconsin. Non-Wisconsin employment is not reported on the Wisconsin State Wage Record system, however the WRIS (Wage Record Information System) is used which has other states' UI wage information.
• **Self Employment**	Yes or No Radio buttons. A Yes response indicates that the person is self-employed. Self Employment is not reported on the Wisconsin State Wage Record system.
• **Other Non-UI Covered Employment**	Yes or No Radio buttons. A Yes response indicates that the employment is with an employer that is not required to report wages on a quarterly basis to the Wisconsin State Wage Record system. See the UI Division's web site for a complete description of excluded employment.
• **Supplemental Data Verification Status**	Dropdown Menu that includes the following options: • Check or Cancelled Check (from employer) • Employer Record (or other written statement) • Income Statement • Not Employed in the Quarter • Not Verified If this field is not completed or if Not Verified is selected, the information provided will not be considered for WIA Performance. Workers must retain a copy of the documentation in the paper case record.

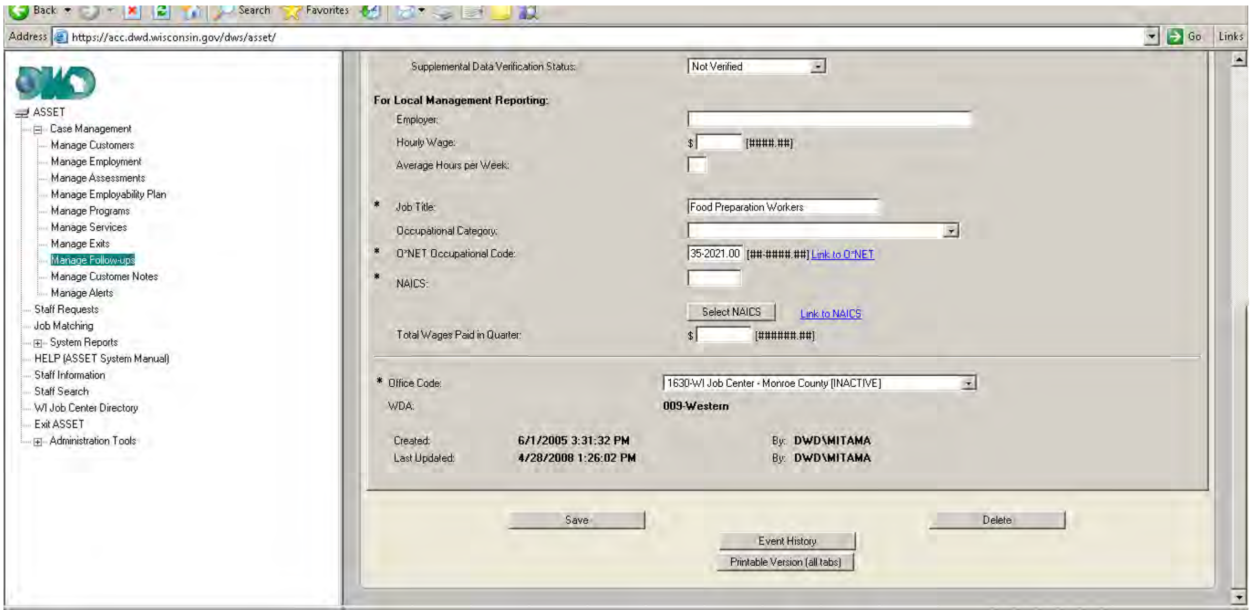
The last section is for **Local Management Reporting** and can be used for all programs in ASSET. This data can be used by staff to predict performance outcomes or to monitor their service provider activities.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The section will look like this:



Workers should report the information for each of these fields for each quarter. If an individual has more than one employer in a quarter, the information shown should be for the employer as of the end of the quarter, or if multiple concurrent jobs, for the most important job. However, the field for the Total Wages Paid in Quarter should be the **sum** from all employment in the quarter.

Once the data is entered, click on SAVE to update the database. Workers may return to any previously entered quarter's data to update it. **NOTE: Workers should record any new employment on the Employment History in the Manage Customer function so that a complete work history is maintained for the individual.**

A worker may choose to delete any quarter's information by using the Cancel Add Quarter button (as seen on page 8). This should only be done when the customer's information was incorrectly reported or if the customer began a better job in the same quarter.

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The field descriptions for this section are:

FIELD	FIELD DESCRIPTION
• **Employer Name**	Text field for the name of the employer or company. Be as complete and accurate as possible to avoid potential confusion.
• **Hourly Wage**	Text field. Enter the hourly wage for this job. If wage is other than hourly, workers should attempt to factor an hourly wage based on salary, commissions, and in-kind wages. etc.
• **Average Hours Per Week**	Text field to indicate the typical number of hours per week that the individual is scheduled to work.
• **Job Title**	Name of job that the participant was hired into.
• **Occupational Category**	The Occupational Category related to the Job Title.
• **O*NET Code**	The O*NET code is system generated once the occupational category is selected. A worker can use the Link to O'NET to access additional codes if preferred.
• **Select NAICS**	The NAICS code is system generated when a worker clicks on the Select NAICS link.
• **Total Wages Paid in Quarter**	Numeric text field to indicate the total wages earned by this individual in the calendar quarter being reported. This can be actual (from check stubs) or calculated amount.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

Follow-Up Services

The Follow-Up Services section is used for reporting services provided to a customer. Follow-Up services may be provided at any time during program participation or at exit. To record a follow-up service, a participation date must be evident in an episode.

Like the other Follow-Up sections, any Follow-Up Services reported for this customer in the past are displayed in historical rows. Workers may review those services by clicking on the underlined Service link. To report a new Follow-Up Service, click on the Add Follow-Up Service Button. The Services section of the Follow-Up Summary screen looks like this:

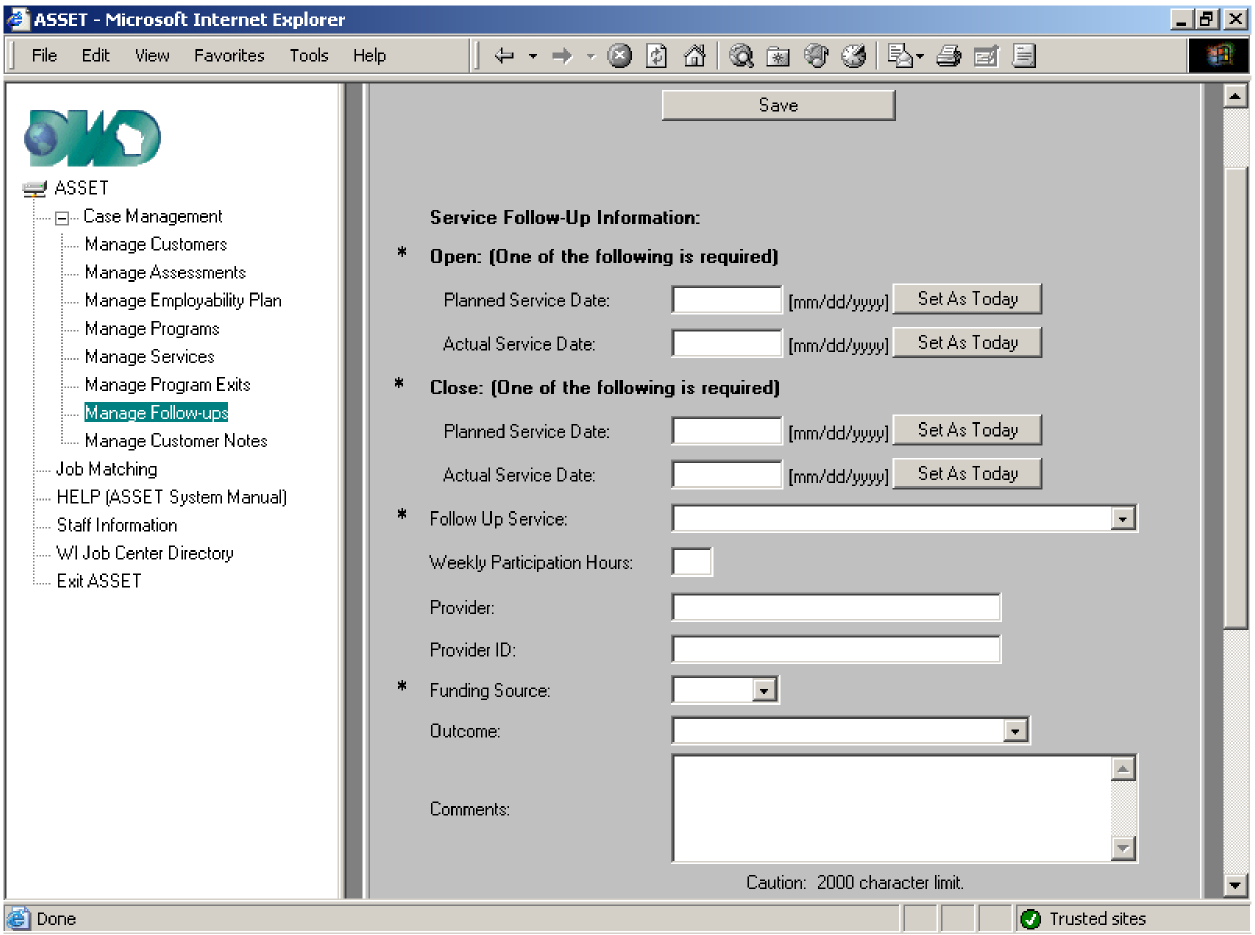
The next screen looks like this:

The worker should then click on the appropriate Program Name to enter the Follow-up Service. The screen will look like the one on the next page.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____



ASSET CASE MANAGEMENT FUNCTION

3-9 ____MANAGE FOLLOW-UPS____

The data elements captured on this page are:

FIELD	REQUIRED	DESCRIPTION
• ***Open: Planned Service Date Actual Service Date**	Yes	The date the Follow-up Service is either planned to start or actually starts. At least one of these dates must be entered. Note that an Actual Service Date cannot be in the future.
• ***Close: Planned Service Date Actual Service Date**	Yes	The date this service is either planned to end or actually ends. If a planned date, it may be the current date or a future date. If an Actual Service Date, it cannot be a future date.
• ***Follow-Up Service**	Yes	Select from the dropdown list the appropriate service being provided.
• **Weekly Participation Hours**	No	Enter the number of hours per week the worker anticipates the WIA customer will participate in the service or activity.
• **Provider**	No	The name of the Provider who will provide the service.
• **Provider ID**	No	The ID of the Provider.
• ***Funding Source**	Yes	From the dropdown, select either Non-WIA or WIA as the source of the funding for the service.
• **Outcome**	No	From the dropdown, select the response that best describes the result or outcome of the service provided.
• **Comments**	No	Text box that allows the worker to note special information about this follow-up service.
• **By Block**	Yes	The system defaults to the User and Office of the person logged on, but this may be changed as appropriate.

Return to Index – Click here

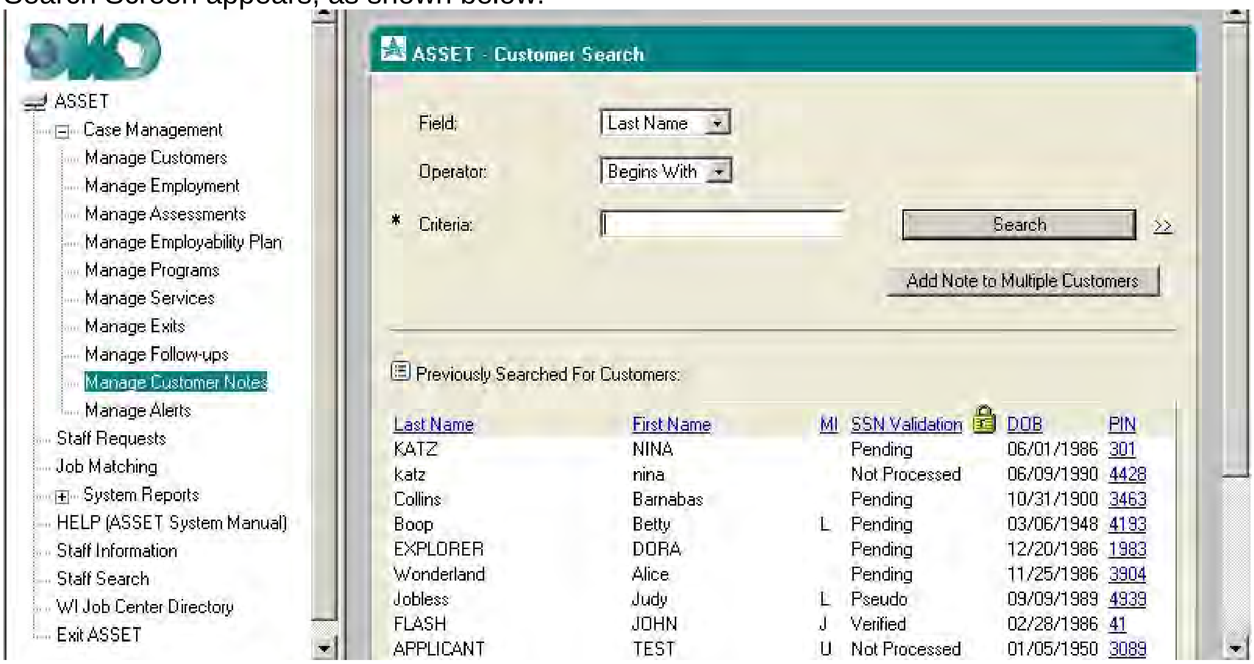
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

The Customer Notes function in ASSET provides workers and others with an opportunity to make a narrative entry about the customer that is not elsewhere documented. The Customer Note can be entered by anyone with ASSET access and appropriate security to update records.

Manage Customer Notes is accessed from the ASSET Menu Tree. Click once, and the familiar Search Screen appears, as shown below:

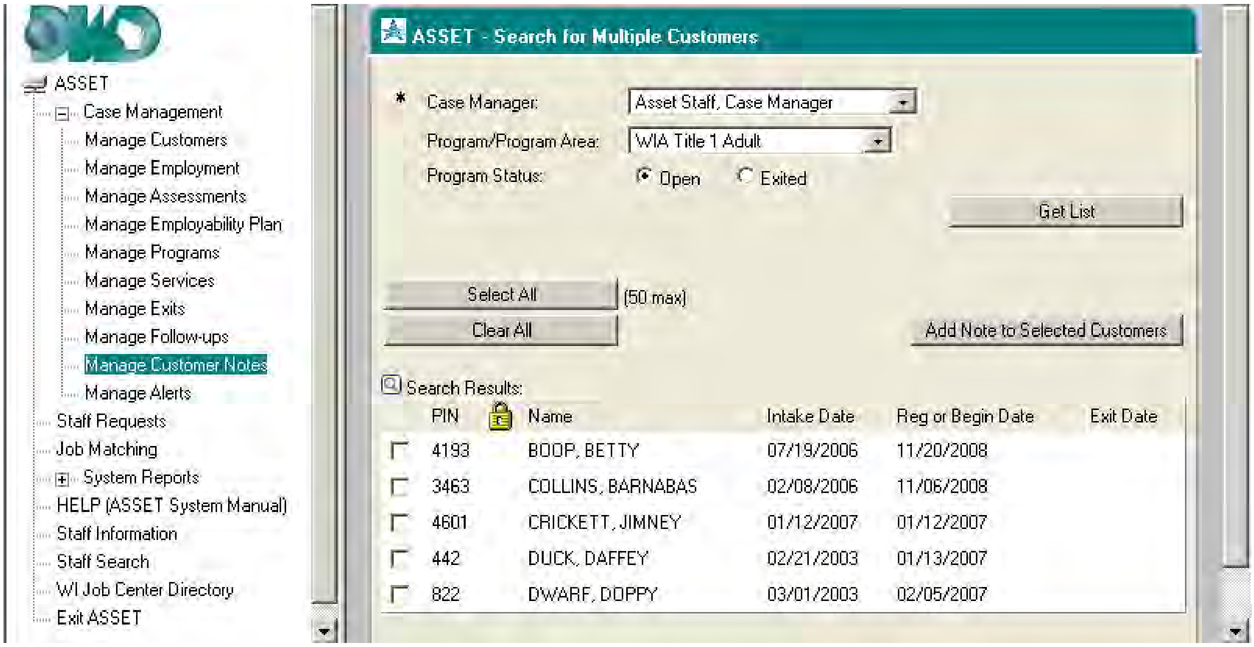


A worker can "Add Note to Multiple Customers" when the record is currently open or exited in ASSET. To add multiple notes click on the Add Note to Multiple Customer button. The screen then looks like this:

ASSET Users' Guide

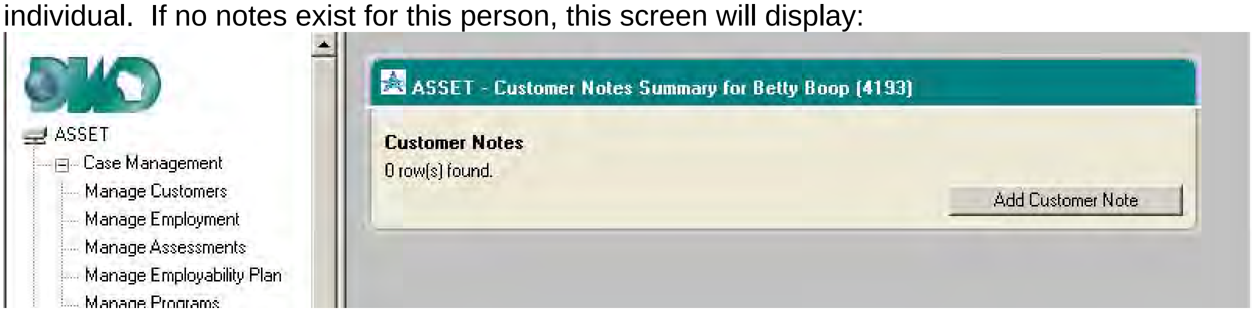
ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____



Once the desired list is returned, place a check mark in the box (located on the left of the page), under the Search Results column to post the note for the desired customers then click on the Add Note to Selected Customers button. This returns the user to the Customer Note details screen for completion of the Note. Once submitted, that note is recorded for each individual that was selected.

If the note is for a customer that appears in the Previously Searched For Customers, click on the PIN of that customer (underlined at right of the Customer Search screen). If the person is not in the list, enter search or advanced search criteria and conduct a search to find the correct individual. If no notes exist for this person, this screen will display:

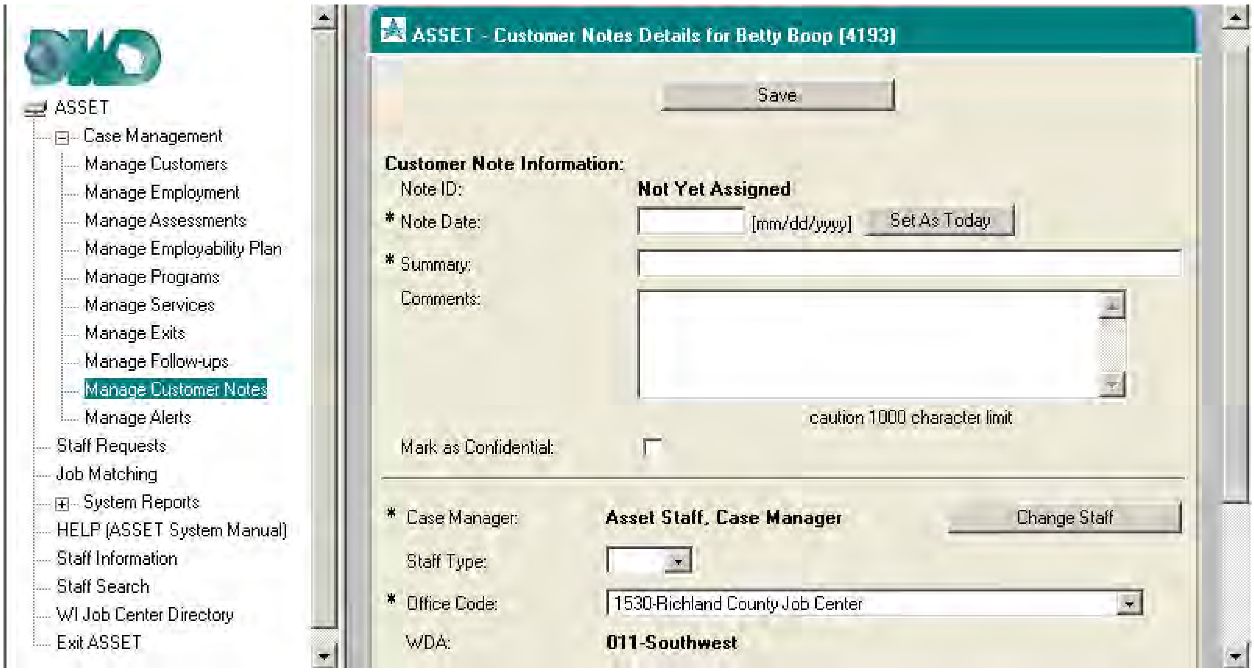


Click on the Add Customer Note and this screen will display:

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____



The Note information that can be added includes:

FIELD	REQUIRED	DESCRIPTION
• **Note Date**	Yes	Date that the note is about, usually the date the information is reported or the contact was made.
• **Summary**	Yes	A short statement that gives a summary or key to what the longer narrative is about. For some notes, this may be the only entry. An example might be "No show, no call for 4/1/06 appt".
• **Comment**	No	The full narrative comments that the worker has determined to be a part of the permanent case record.
• **Case Manager**	Yes	The name of the Case Manager responsible for the note.

Once a Customer Note has been entered and saved, the Note is given a Note ID (a system-assigned number the ASSET database uses to track Case Notes) and the note is stored permanently as it was submitted.

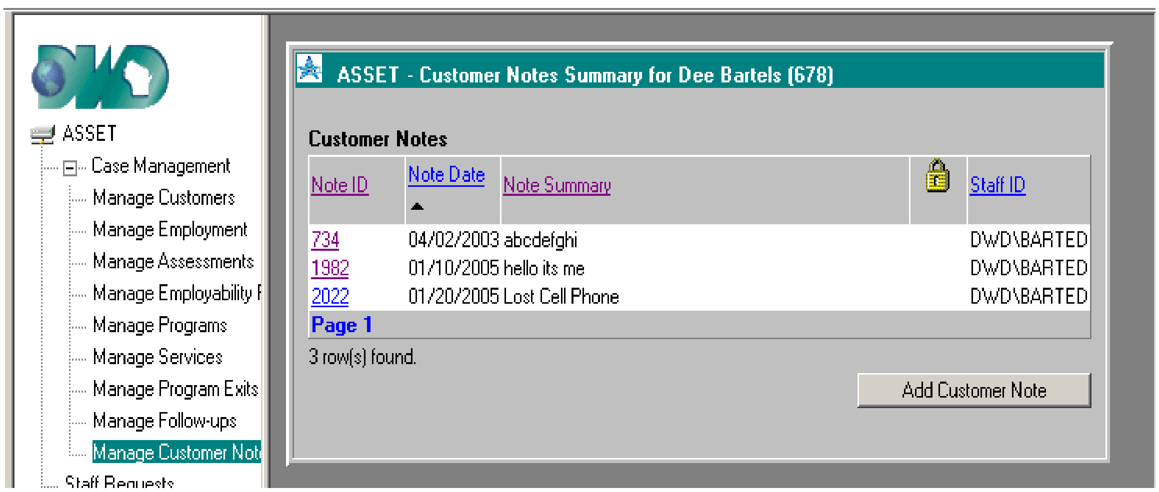
ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

**** IMPORTANT ****

Once a Customer Note has been saved, it cannot be edited or deleted by anyone, except ASSET Administrators at DET.

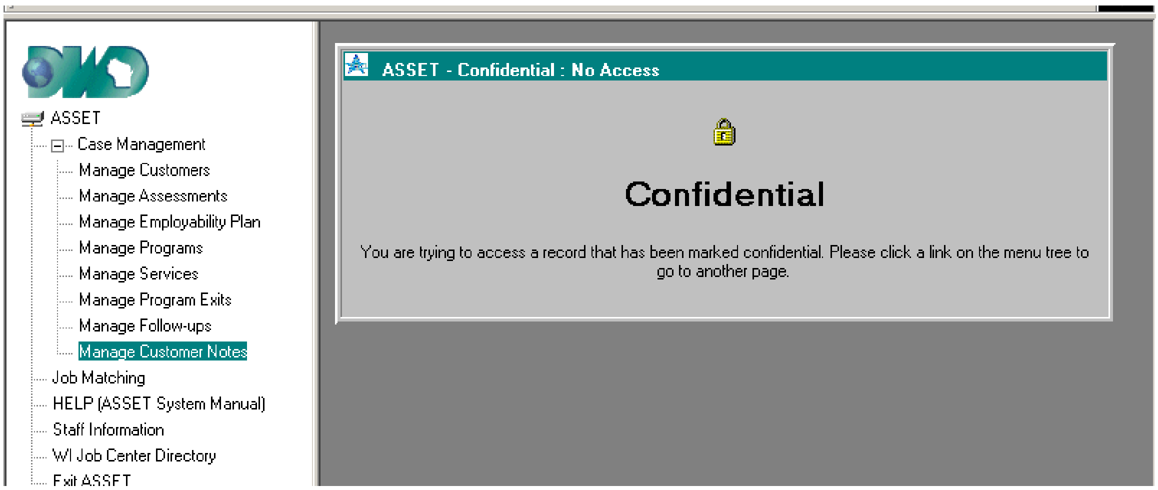
The screen below displays once the Save button is clicked. It is also the screen that appears when first coming into the Manage Customer Notes function and selecting an existing or searched for customer.



A Case Manager can view a list of case notes in a sort order of their own choosing. A sort can be completed by selecting either Note ID, Note Date, or Staff ID. If Note Date is chosen, click on the Note Date (underlined) in the header column and the notes will re-arrange from oldest to newest (notice a down or up triangle [∇] appears that lets the user know which direction the sort is being done under for each column header). Click the Note Date again and it will re-arrange the notes back from newest to oldest. The system-assigned Note ID is used as the link to retrieve this note for review. If the note has been marked as "Confidential", an X will display on the line below the lock icon, and only the Case Manager, Supervisor or ASSET Administrators can have the note retrieved. If a non-authorized user attempts to access a confidential note, the following screen displays:

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____



Case Notes – General Policy

Case Notes must be a factual record of case history and action. These comments develop a summary record of an individual's chronological program participation history. The following are key recommendations for writing appropriate comments:

- **Enter data immediately** so events are entered sequentially. The case notes should provide anyone with program knowledge a general concept of the individual's chronological participation in the program.

- **Make them understandable.** Phrase and punctuate all comments so that they are easily understood by others. Use common abbreviations and acronyms so that others can read them.

- **Write comments as if a public record.** Note actual worker observations and actual exchanges that took place between the individual and the case manager. A good rule to follow is to write only comments that the worker would be willing to defend in court. Case notes are viewable by any individual with a logon ID, unless marked as confidential. (Even confidential notes are viewable by a few ASSET users.) Also, if an individual requests to see a copy of his/her record – that includes the case notes.

- **Maintain notes of all participant contacts** (in person, via telephone, e-mail or mail) to assist in refreshing the case managers memory and to help plan future employment and/or training direction. Also note if someone calls on behalf of the individual.

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

- **Document case manager actions and employment/training plans** in the event the case manager is questioned at some later point regarding his/her interactions with the individual.

- **Do NOT enter worker biases or judgements.** Notes should be written to describe an individual's behavior rather than case manager's interpretation of the behavior. For example, don't make the statement, "Individual came in drunk". Instead describe the participant's behavior, such as "Individual had slurred speech, red eyes, had a difficult time maintaining balance, had an odor which resemble alcohol and repeatedly called me sweetheart".

- **Avoid making subjective statements**. Workers must avoid entering personal comments in the case record. As case managers, workers are to remain objective and ensure that their personal values and opinions do not interfere with the process of providing effective case management. Comments that include subjective statements can quickly become discredited in an appeal process.

- **Review what is written before saving.** Workers should review comments for accuracy, comprehension, readability, grammar, and completeness. **Once saved, only DET ASSET Administrators may update or delete the Customer Note.**

The following are examples of subjective statements and an objective way to phrase the situation.

~~Objective Vs. Subjective Statements~~	
Objective (Fact-based)	**Subjective (Opinion)**
The person had an odor that smelled like alcohol.	He was drunk.
Individual stated s/he wants to stay in the home.	S/he doesn't want to work.
The individual has significant barriers to employment including no work history, no HS diploma or GED . . .	S/he will never get a job.
Individual stated s/he did not want to participate in the program.	S/he isn't going to cooperate.
S/he has not paid child support for the past two years.	S/he's a deadbeat Dad/Mom.

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

~~Objective Vs. Subjective Statements~~	
Objective (Fact-based)	**Subjective (Opinion)**
The individual was asked to come in dressed for an interview. S/he came in soiled jeans and a tank top.	S/he doesn't know how to dress.
The individual stated she was at the work experience work site. The supervisor confirmed s/he was not at the site.	S/he's a liar.
The individual states s/he is a people person who enjoys doing things for others.	S/he's a wonderful person.
S/he did not answer any of the questions and stated "It is none of your 'swear word' business." S/he then walked out of the office.	S/he is very hostile.
The individual is two months behind in rent and does not have any source of income.	S/he needs to get a job.
The individual has developed a pattern of no shows for activity and has not called to give reasons.	S/he doesn't care.
The individual didn't show for work five days in a row without contacting the employer.	S/he wanted to get fired.
The individual completed 10 more employer contacts than required and stated s/he really wants a job.	S/he really wants a job.
S/he stated s/he was excited about working in the program and that s/he wanted to find employment.	S/he is enthusiastic.

~~Basic DO's and DON'Ts~~	
Case notes should be:	**Case notes should not be:**

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-10 ____MANAGE CUSTOMER NOTES____

~~Basic DO's and DON'Ts~~	
Case notes should be:	**Case notes should not be:**
• Factual	• Fabrications
• Objective	• Subjective
• Impartial	• Biased
• Brief	• Wordy
• Unemotional	• Heartrending
• Impersonal	• Personal/Highly Confidential
• Unprejudiced	• Reflect Workers Prejudices
• Specific	• Vague
• Dispassionate	• Dramatic
• Descriptive of Behaviors	• Interpretation of Behaviors
• Written as Public Record	• Written as Personalized Document
• Written with Commonly Understood Abbreviations	• Written with Personalized Abbreviations
• Precise	• Rambling
• Readable	• Written in code
• General Data	• Highly Sensitive Data
• Concise	• Lengthy

Return to Index – Click here

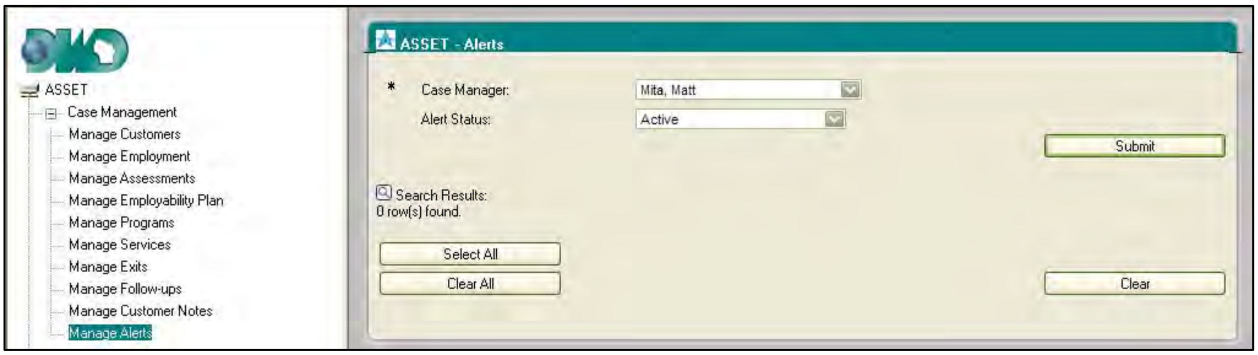
ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-11 ____MANAGE ALERTS____

A new menu item called **Manage Alerts** has been added to the ASSET menu. By clicking on this item the ASSET Alerts page is loaded.

MCI issues alerts to ASSET on a nightly basis. Alerts are based on the SSN verification outcome of records submitted to SSA for validation. They allow workers to quickly identify records that require follow-up.
.



Alerts are issued for two reasons. First, to inform a worker that an SSN for a particular ASSET record was not verified and that worker intervention is required. Second, it informs workers that information on the ASSET record was modified during the SSN validation process. This type of alert generally doesn't require worker intervention.

If an ASSET record is verified by the validation process, the SSN Validation status on the Manage Customer screen is automatically updated to Verified and no alert will be displayed for this record.

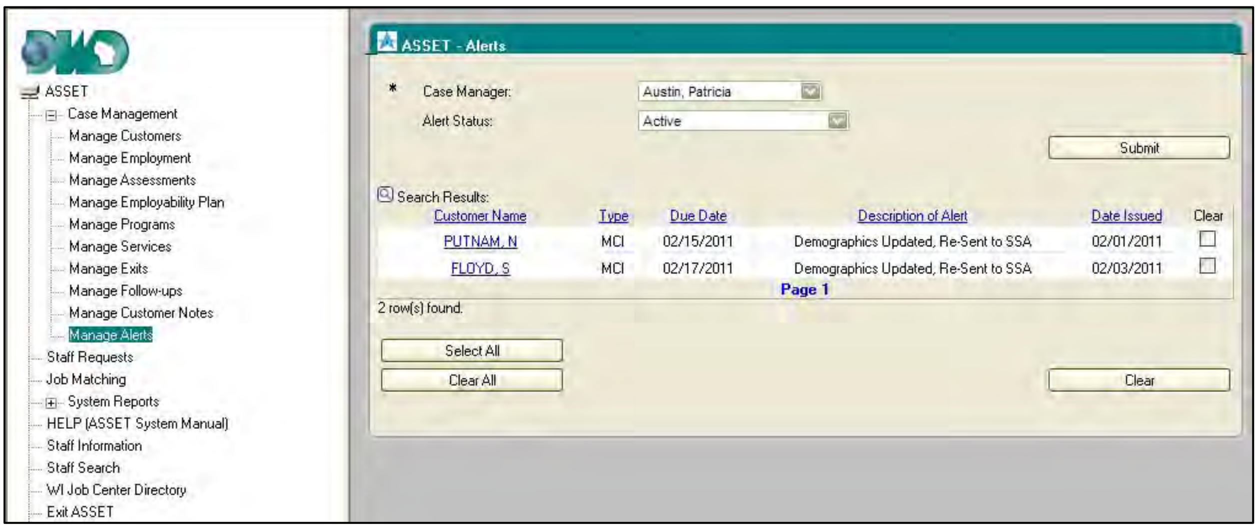
(Because alerts are issued to ASSET nightly, it is recommended that workers check their alerts daily).

There are two alert screens in ASSET, the Alert Listing Screen and Alert Details Screen.

ASSET CASE MANAGEMENT FUNCTION

3-11 ____MANAGE ALERTS____

Alert Listing Screen
On the Alert Listing screen, alerts are listed by case manager. Only the case manager and the case manager's supervisor(s) have the ability to clear alerts, but alerts for any case manager are viewable statewide. A case manager can view her alerts by selecting her name in the Case Manager drop-down field and then clicking the Submit button. If there are no alerts available for a worker, a message that 0 rows were found displays. Up to 20 alerts can be displayed per page, and there is no limit on how many pages of alerts can be generated.



There is an option to select Active alerts or alerts cleared within the past 90 days. Active alerts have not been cleared. Once an alert is cleared it is removed from the active list, but can be viewed up to 90 days after it was cleared by choosing this option.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-11 ____MANAGE ALERTS____

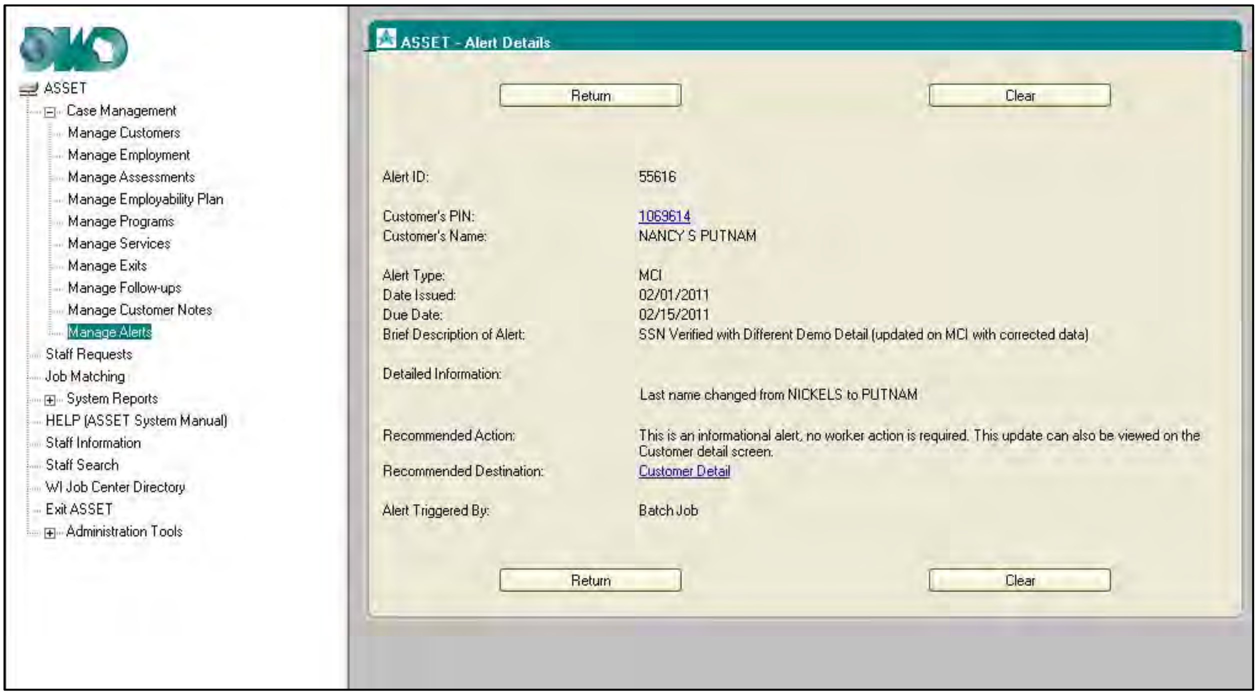
The field definitions are:

FIELD	FIELD DEFINTIONS
• **Customer Name**	Last name of customer for which the alert was issued.
• **Type**	Type of alert issued. At this time all ASSET alerts will be issued by MCI. In the future other processes will issue ASSET alerts.
• **Due Date**	Set for two weeks after the alert was issued. The due date is a target date to resolve the alert; it doesn't have system implications if it isn't cleared.
• **Description of Alert**	MCI alerts are issued for non-verified records and when an ASSET record is updated by the MCI process. The alert description will identify the type.
• **Date Issued**	Date the alert was issued by MCI.
• **Clear**	Alerts are cleared by clicking the Clear box for each alert. They can be cleared separately, several at a time, or all at once. A checked alert can be unchecked by simply re-clicking the clear box.

ASSET CASE MANAGEMENT FUNCTION

3-11 ____MANAGE ALERTS____

Alert Detail Page
Every alert will have an alert detail page. This page is accessed by clicking on the last name of the participant. The alert detail page provides information that should assist a worker in taking the appropriate steps to correct the problem identified by the alert.



The Field Definitions are:

FIELD	FIELD DEFINITION
• **Alert ID**	A system derived ID.
• **Customer PIN**	Number assigned to the participant for whom the alert was issued.
• **Customer Name**	Customer name.

ASSET Users' Guide

ASSET CASE MANAGEMENT FUNCTION

3-11 ____MANAGE ALERTS____

FIELD	FIELD DEFINITION
• **Alert Type**	Currently all alerts will be issued by MCI. In the future other alerts will be issued and the process that generates the alert will be listed here.
• **Date Issued**	Date Alert was issued by MCI.
• **Due Date**	Set for two weeks after alert was issued. This is a target date to resolve the alert; there are no system implications if it is not cleared.
• **Detailed Information**	Detail about the alert and often provides the reason the SSN can't be validated by SSA.
• **Recommended Action**	Information to assist a worker in the appropriate action needed to resolve the alert.
• **Recommended Destination**	Appears as a link and takes a worker to the appropriate ASSET page where the data relevant to the Alert is located.
• **Alert Triggered By**	MCI Alerts are generated by a nightly batch program.
• **Return/Clear**	These two buttons (located at the top or bottom of the screen) can be used to either "Return to the Alert Listing" page or a worker can "Clear the Alert" directly from this screen.

Return to Index – Click here