# ASSET Users' Guide

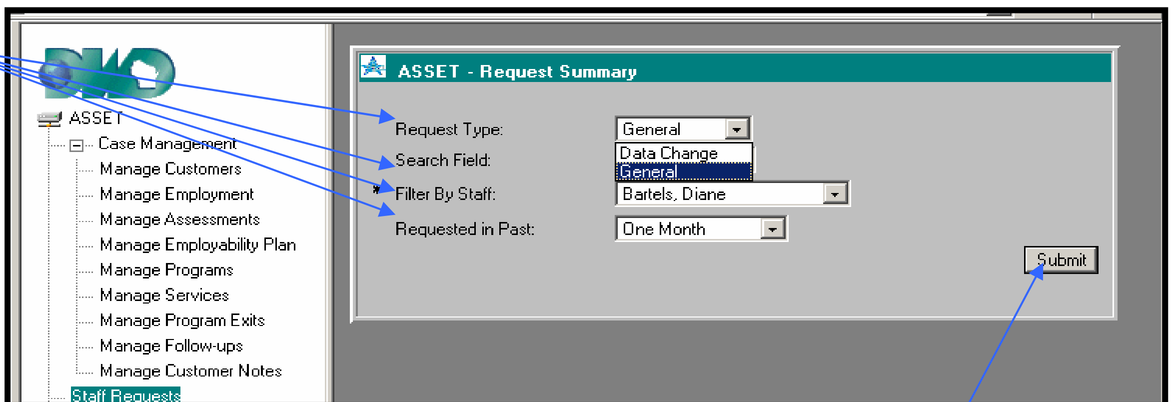
## ASSET CASE MANAGEMENT FUNCTION

### 4-1 ____STAFF REQUESTS____

ASSET users can submit data changes/corrections by clicking on the Staff Request option from the ASSET menu. When this function is used, a Request Summary screen will appear. Note that the screen defaults to the user's name and office number, although this information can be changed as needed.

There are four distinct areas to choose from on the Request Summary screen. They are: Request Type, Search Field, Filter By Staff, and Requested in Past. The Request Type function gives users the ability to request data fixes in ASSET directly (called the Data Change option).

Another feature on the Request Summary screen is the Search Field. Staff can conduct a search option by Staff, Customer PIN, or Status.




If the Customer PIN option is selected, a drop down appears and the user can key in the PIN by which to conduct their search.

If "Filter By Status" is selected, a dropdown appears that contains a list for the status of the request. Staff will be able to see the current status of a request, that is, what level the request is at: Pending, Denied, or Completed. Also, a Staff Request that was developed in error can be Withdrawn.

If the Filter By Staff option is selected, a dropdown appears that provides a list of staff that a user can choose to submit their request to, or to review a prior request status.

The Requested In Past option allows a user to review the status of Requests that users have submitted for the past six months. Users are encouraged to check the status of their requests at a minimum of once a month to determine if a requested change/correction has been completed.

To check on the status of a request, click on the Submit tab and the Request Summary screen appears.

To use the Data Change option on the Request Summary screen, select the Data Change option, and then select the number of desired months for which to review requests (one-six months, depending on the parameter needed). Click on the Submit button to get a listing of the Data Change requests submitted or to check the outcome of the data fixes requested.

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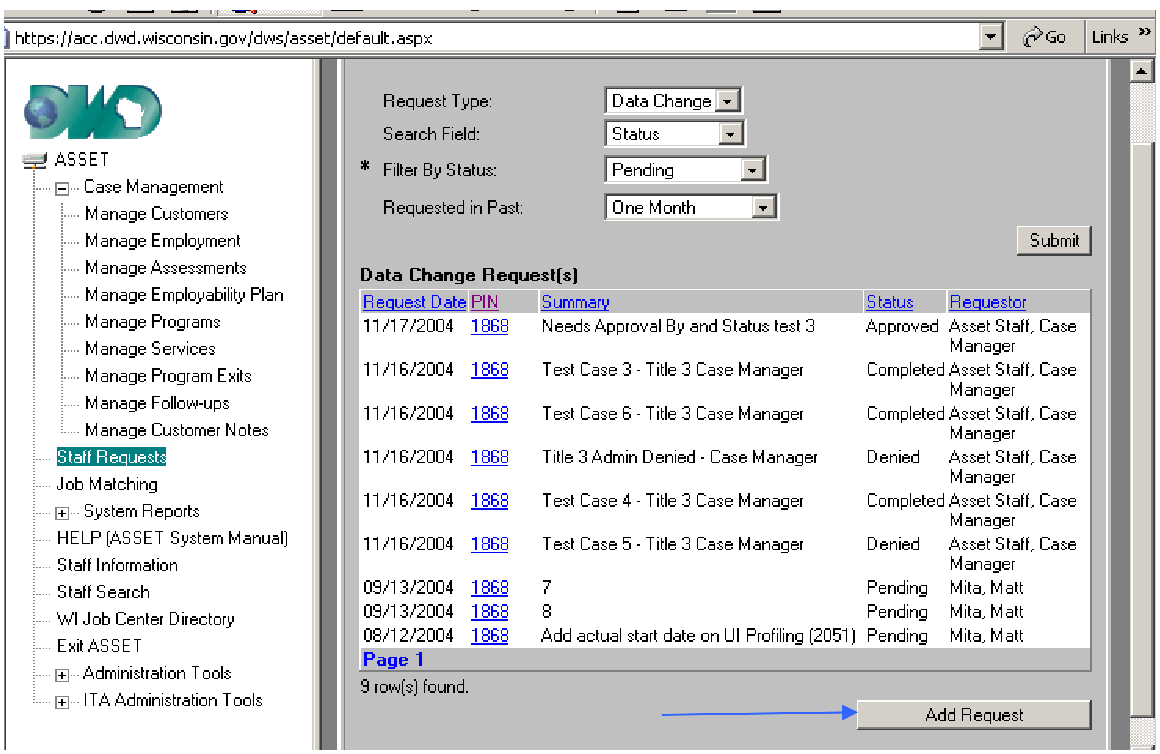
Data Change Requests can be sorted by selecting one of four options listed under the Data Change Request(s) section that are highlighted and underlined in blue on the Summary Screen. They include: the Request Date, PIN, Status or Requestor (staff who made the request). Click on the appropriate function highlighted in blue to get the field by which to sort.

This will require a selection of the name of the WDA Approver from the dropdown. This then automatically routes the request to that person for approval before it goes to DET.

The General Request Option allows users to communicate with one another about a specific customer's record. Its purpose is to assist with case coordination when more than one case manager or program serves a participant. Similarly, workers in one program may create a General Request to a worker for another program. This process will replace the current practice of phone calls and emails.

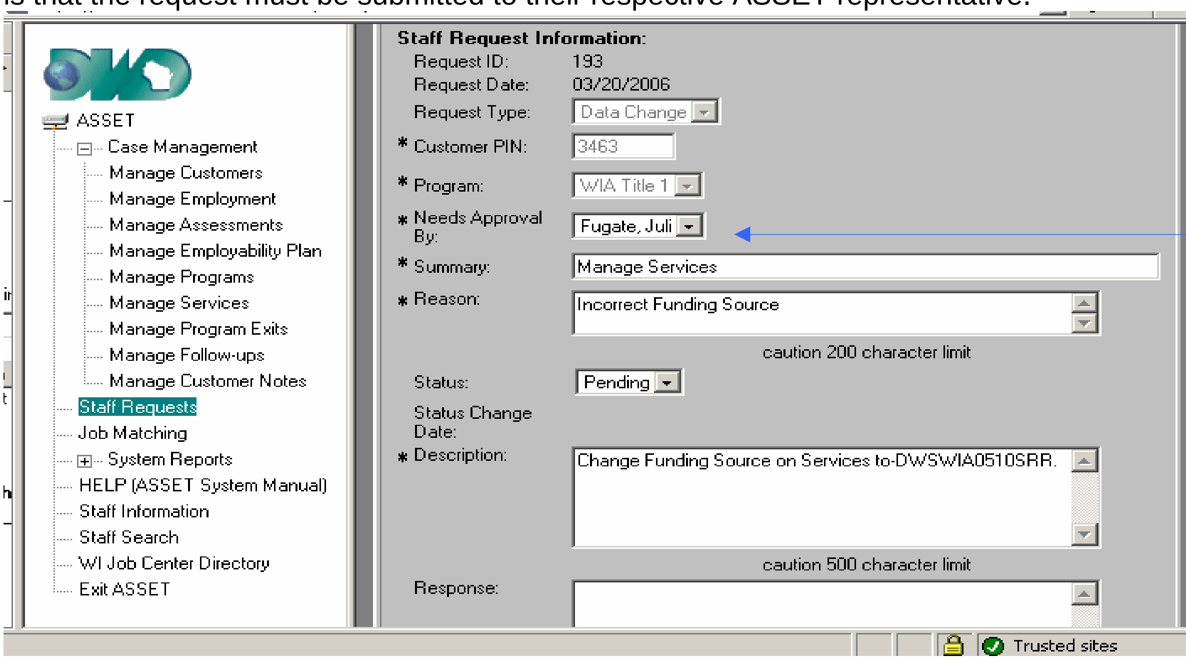



The General Request is created by following the same process used to complete a Data Change request on the Request Summary screen. Staff will begin by selecting the General option on the dropdown, and then click on the Submit button to get a listing of the General Requests that are either Assigned or Sent to the requesting user in the past one-six months.

Upon receipt of a request, open it by clicking on the PIN. Read the request and then determine the appropriate action. When acting on it, or deciding not to comply with the request, change the request to the status that identifies the result of the review. In the Response field comments may be added to help the requestor understand the decision made.

To create a new data change request, click on the Add Request button. This opens a new screen where information is supplied regarding the data fix needing completion.

The ASSET Staff Request Details screen as shown below captures all the information that is necessary to complete data change(s). A requirement for the Title I, and TAA case manager completing a request is that the request must be submitted to their respective ASSET representative.




For each data fix requested, a response is required for fields that have an asterisk (*) beside them. Required fields include the Customer PIN, Program, Summary, Reason for the change, and Description of the change (explain what the change is to be).

An Additional field will pop up when WIA Title I is the selected program. The field that appears is a "Needs Approval By" and will require a user to select the name of the WDA Approver (designated WDA representative) from the dropdown list.

For data changes that do not relate to a specific program, e.g. correcting a Customer Note, users should select the WIA Title 3 as the program.

The Response section is reserved for the WDA Approver and Central Office staff. It will be used to communicate the result of the request, or to communicate information about the request status.

**Do not use the General Request functionality as a substitute for regular e-mails or phone calls.** It should only be used for requesting an update or modification of ASSET documentation for a specific customer, or as a component of coordinated case management.

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### 4-1 ____STAFF REQUESTS____

The following process is used for requesting data changes: (for WIA Title IB and TAA only)

1. The Case Manager (service provider/contractor) completes the request and submits it to a designated local staff for their area (known as an Approver).

2. The Approver may either Approve or Deny the request. Some data changes can be completed by the local Approver. If necessary, the local Approver will submit the request to a JCS Administrative staff for review and completion.

3. Data Requests that relate specifically to Performance, Policy, or Program related issues can be referred/submitted by the local Approver to the appropriate DWD Central office staff for review.

4. The Local Program Liaison's (LPL), and/or designated Performance & Policy staff are the QA Review staff for each of the WDA's. Upon review and approval, they will move the request to the QA Approved status level if appropriate. It is at this time the JCS Administrative staff will make approved requested changes to fields in ASSET, and then change the status to Completed.

Field Descriptions are:

| FIELD | REQUIRED | DESCRIPTION |
|---|---|---|
| • **Request ID** | System Assigned | System Automated |
| • **Request Date** | System Assigned | System Automated as Request Create Date |
| • **Request Type** | Yes | Type of Request – either Data or General |
| • **Customer PIN** | Yes | PIN assigned to Registrant Record |
| • **Program** | Yes | Name of the WIA Program of Registration |
| • **Needs Approval By** | Yes | When a Title I or TAA Program is selected this field appears and requires an Approval from the WDA representative. |
| • **Summary** | Yes | Use this field to identify the ASSET Menu item that the request is for, e.g. is it under Manage Programs, or Manage Services, etc. |
| • **Reason** | Yes | Why you are asking for the request. An example could be, late reporting, missed the soft exit report, etc. |
| • **Status** | No | Current level of request |

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| FIELD | REQUIRED | DESCRIPTION |
|---|---|---|
| • **Status Change Date** | System Assigned | System Automated |
| • **Description** | Yes | What field needs to be changed and a description of the change. |
| • **Response** | No | Reserved for DET staff to relay request results or needs. |
| • **Completed By** | No | System Automated. Who completed the request |
| • **Requested By** | No | The name of the individual who developed the request. |
| • **Staff Type** | No | Used by DVOP and LVER staff |
| • **Office Code** | Yes | System assigned office number. |

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