ASSET Users' Guide

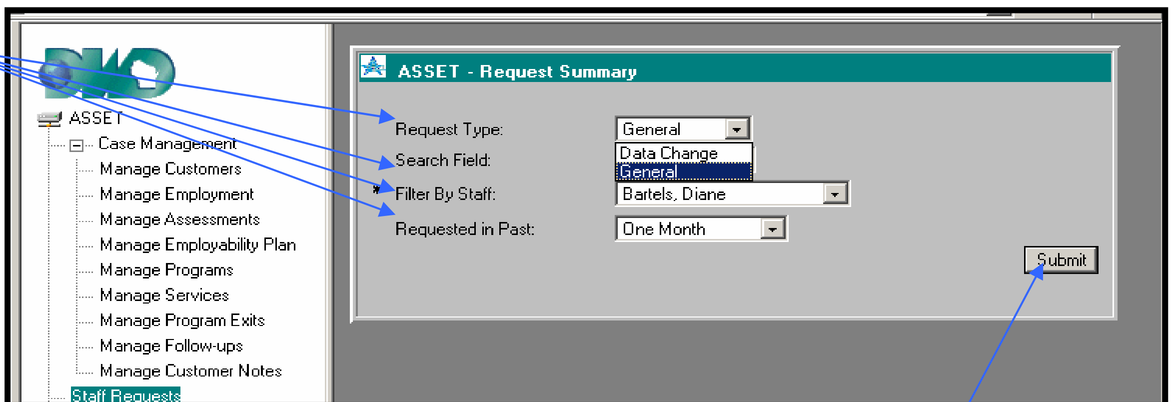
ASSET CASE MANAGEMENT FUNCTION

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 Also, a Staff Request that was developed in error can be Withdrawn.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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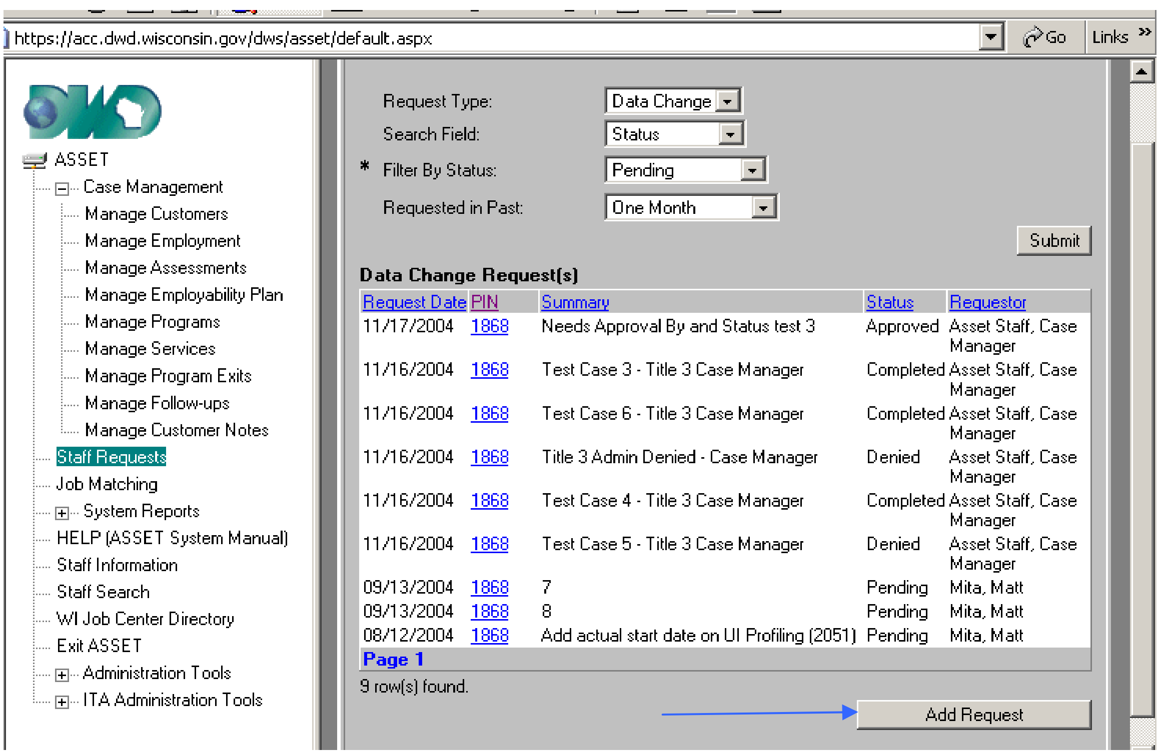
Data Change Requests can be sorted by selecting one of four options listed under the Data Change Request(s) section that are highlighted and underlined in blue on the Summary Screen. They include: the Request Date, PIN, Status or Requestor (staff who made the request). Click on the appropriate function 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.

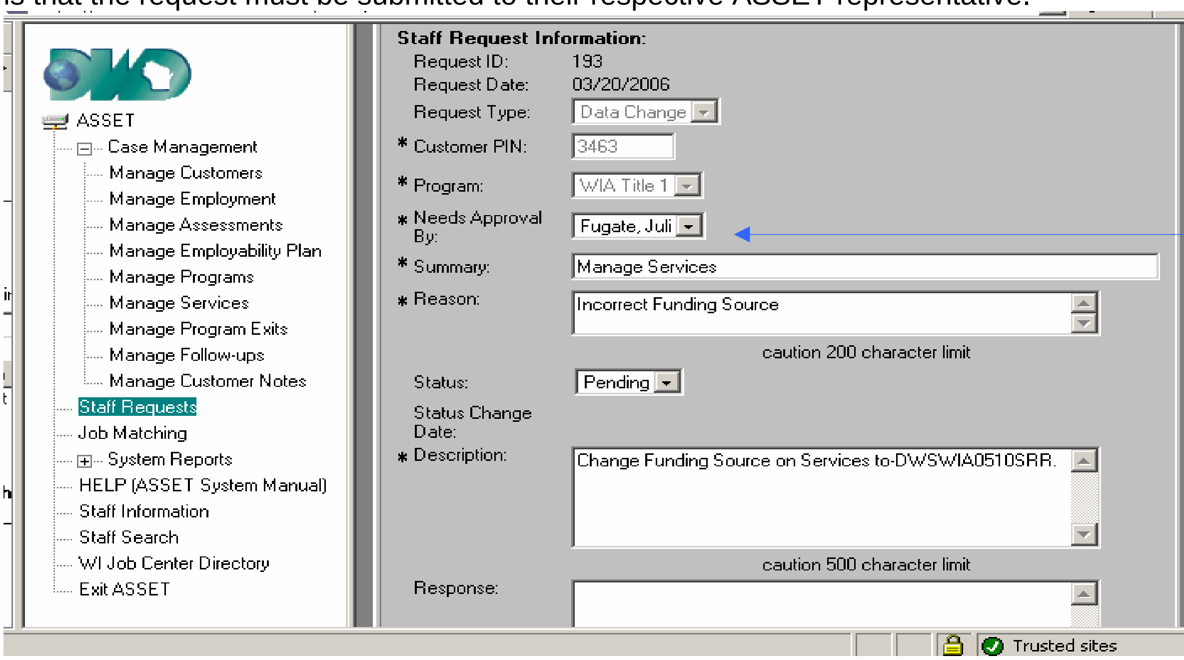


The General Request is created by following the same process used to complete a Data Change request on the Request Summary screen. Staff will begin by selecting the General option on the dropdown, and then click on the Submit button to get a listing of the General Requests that are either Assigned or 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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4-1 ____STAFF REQUESTS____

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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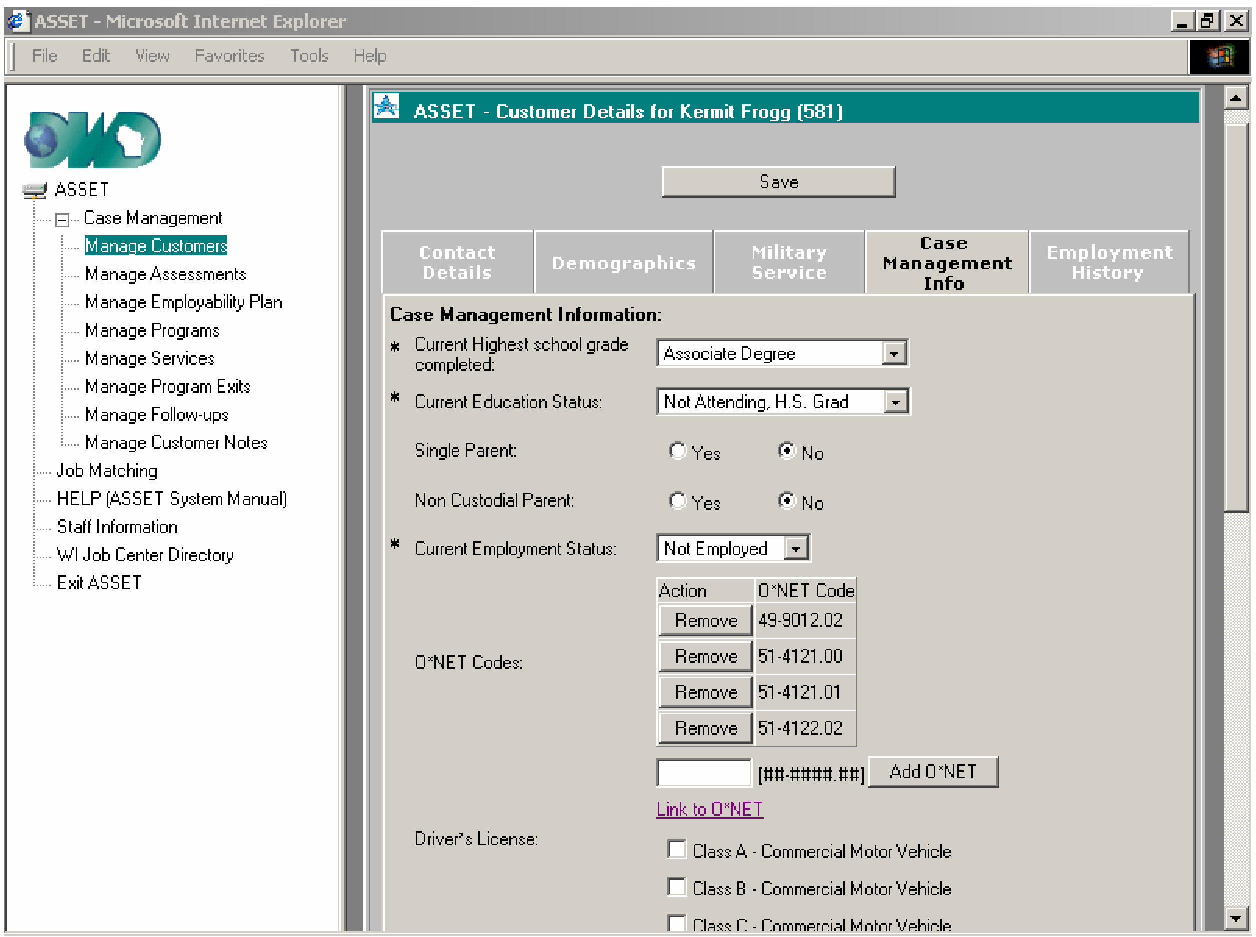
ASSET FUNCTIONALITY

4-2 ____ASSET JOB MATCHING FUNCTION_____

The Job Matching Function in ASSET allows a worker to see what currently open job orders on JobNet may be available for a specified customer. This process links ASSET to Wisconsin's JobNet orders through a match on the occupational coding system called O*NET.

The Job Matching function uses reads the customer's record to determine the O*NET code or codes for the customer. Because of this connection, the process relies on what the Case Manager has entered in the Manage Customer function. This was done on the Case Management tab, as shown below:



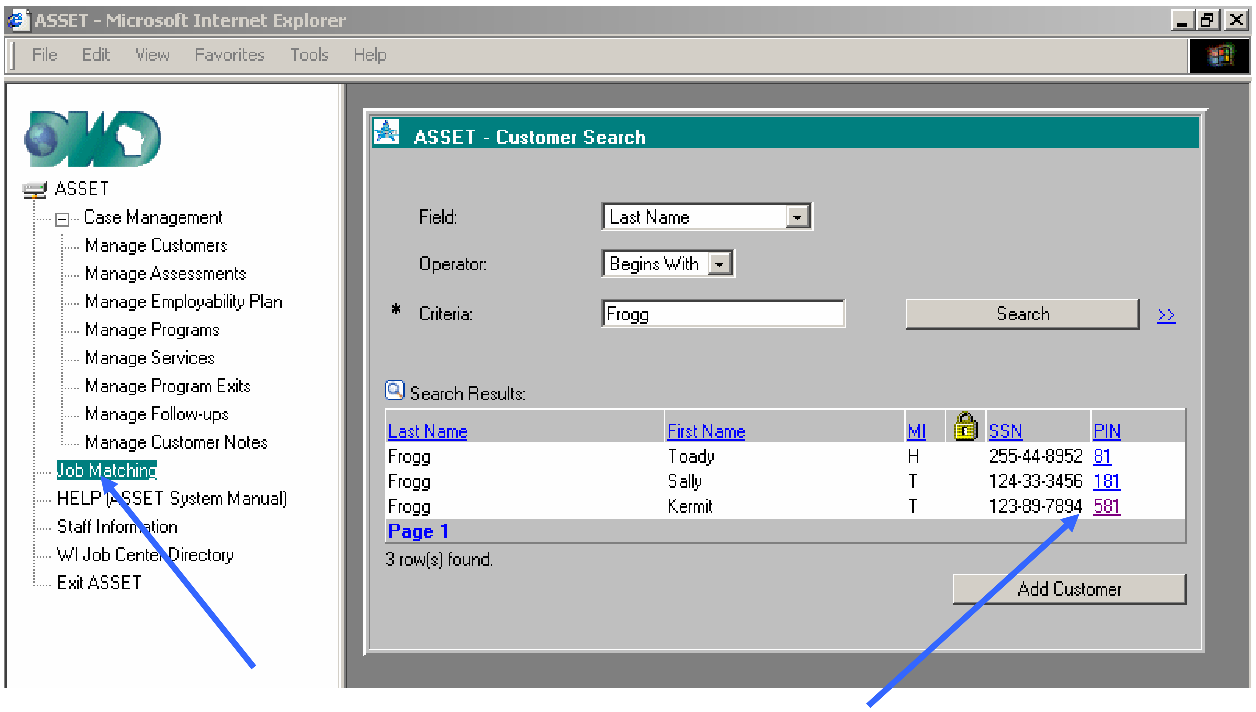
Note: When the Case Manager determines the type of jobs that a customer is looking for, one or more O*NET codes can be entered to the customer record. The worker may enter up to ten different O*NET codes, and may update this information, as the customer's job search needs change.

ASSET FUNCTIONALITY

4-2 ____ASSET JOB MATCHING FUNCTION_____

Using the Job Matching Function:
To launch Job Matching, click on the Job Matching function on the Menu Tree.

This opens the Customer Search page, where the worker can select a Previously Searched For Customer from the list or do a search for a new customer.



Job Matching Function & Select a Customer

Clicking on the PIN of the customer for whom the job matching is to be done opens a page that displays the customer's O*NET code(s) from Manage Customer. If the O*NET code(s) listed for this customer are no longer applicable or are invalid, the worker must update or delete the code on the Manage Customer page. It cannot be done in the Job Matching function.

Using Job Matching:
The job matching functionality affords the worker several options to conduct a job order search using either O*NET code, geographic location of the job or both as search parameters. The combination of the two selections will present a listing of job orders.

This is what the page for job match selection looks like:

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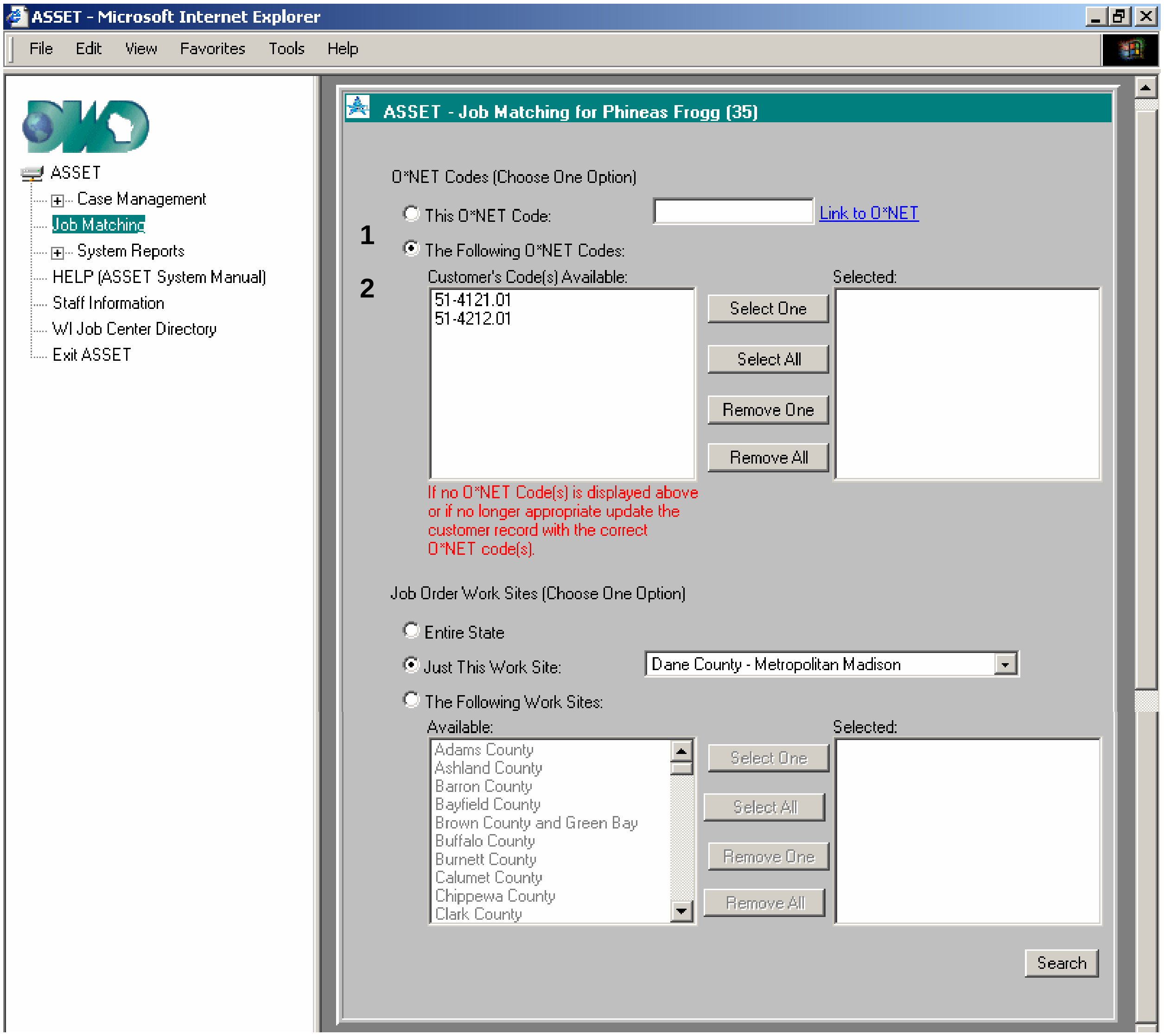
4-2 ____ASSET JOB MATCHING FUNCTION_____



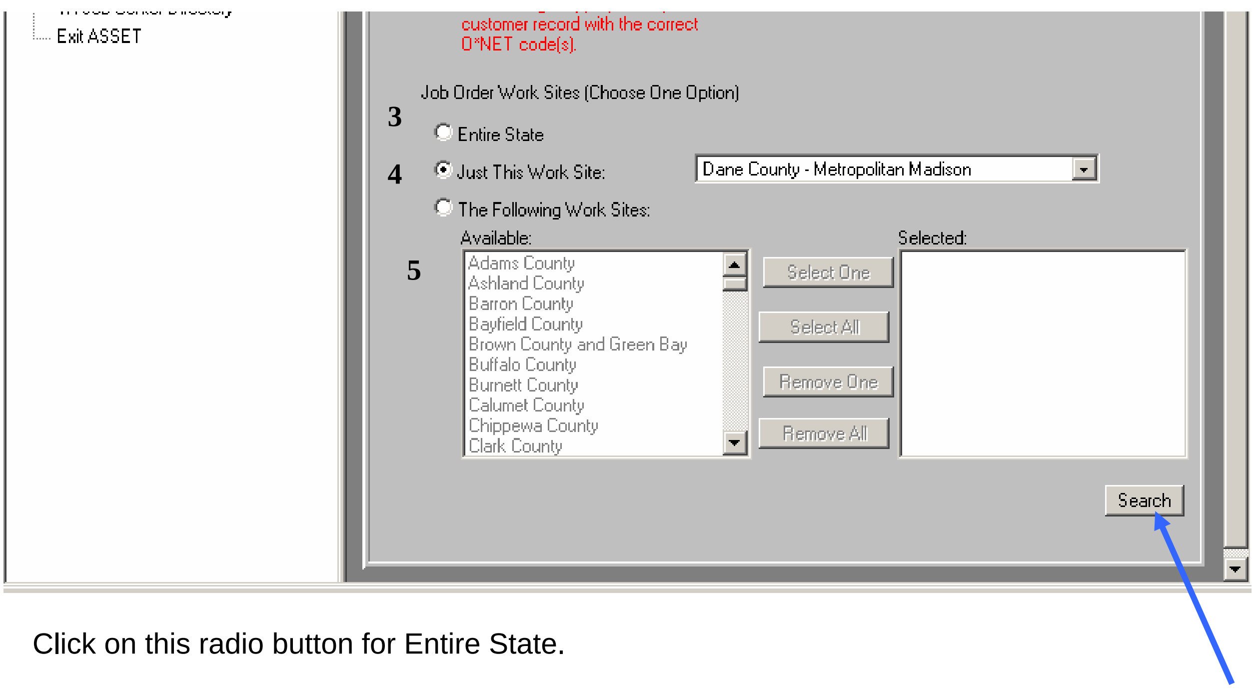
The upper part of the page is where the O*NET parameters are entered. The lower part of the page is where the Job Order Worksite parameter is entered. Clicking on the selected radio buttons creates the search criteria for this customer's job matching.

O*NET Options:

1 Check this option to use a new O*NET code (used only for this match and is not retained on the customer record). Note: You may enter just the high-level O*NET job family code, which is the first two characters of the code. This will result in a broad spectrum of job orders that are in the job family. You may use additional digits beyond the two for job family, but the format must be correct. The format is ##-####. ##. If the job family is used, enter just two numbers, but if more numbers are entered, the format is necessary. For example, this is one possible option: 41-10, but this not: 4110.

2 Check this option for O*NET codes on the Manage Customer record. All available codes that are displayed will be displayed in the Customer's Code(s) Available box. If the worker opts to search on one of these codes at a time, click on the O*NET code on the left side to highlight it, and then click on the Select One button. That O*NET code will move to the right column of selected codes. To move all the codes from the ***Available*** column to the ***Selected*** column, use the Select All button.

The second parameter for job order search is geographic location of the job. The worker, based on the customer's access to transportation and willingness to commute or move for a job, can limit the job order search to just one county, to a number of selected counties, or to the entire state.



3 Click on this radio button for Entire State.

4 Click on this radio button for Just This Worksite – which is a dropdown of all the job order sites in JobNet. The default is based on the customer's residential county code in Manage Customer. Note that some counties have more than one worksite option in JobNet, so the default is the first one in the list for that county.

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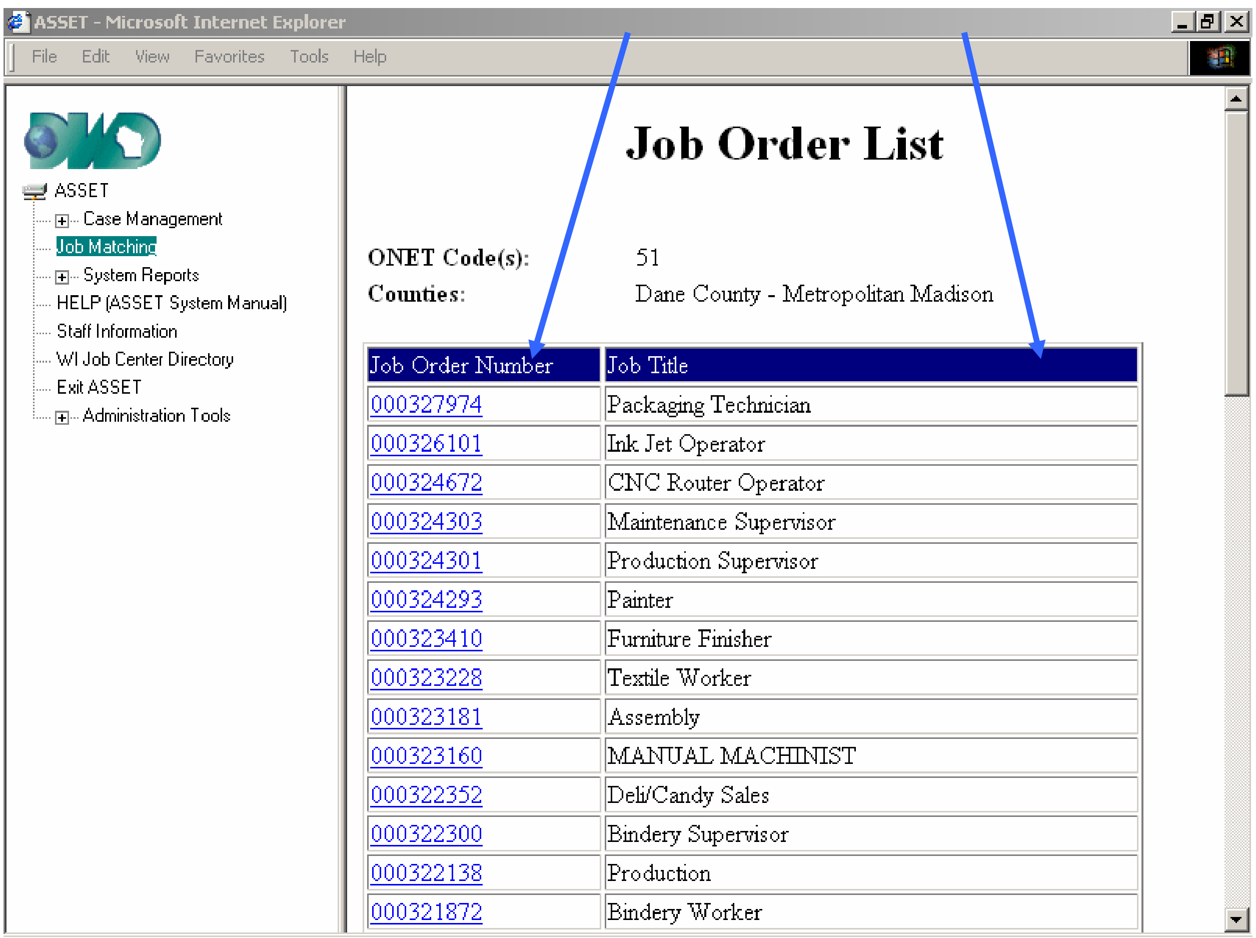
4-2 ____ASSET JOB MATCHING FUNCTION_____

5 Click on this radio button for a selection of sites. Find the county/worksites for search and click on the choice in the Available column. Then click on the Select One button and that selection will appear on the right side (Selected) column.

Once the O*NET and Job Order Worksite parameters are set, click on the Search button. If there are jobs available on JobNet for the O*NET code(s) and location(s) selected, a page displays listing all the open job orders that meet the search criteria.

This is an example of the Job Order List that appears if there are open JobNet orders for the O*NET codes and Location(s) selected. ***Job Order Number*** and ***Job Title*** show on the list.



To view any specific job order, click on the Job Order Number link (underlined). This opens a new browser window that launches JobNet. The page that displays is the complete job order as it appears on JobNet. This session is imposed on top of the ASSET session, as shown on the next page:

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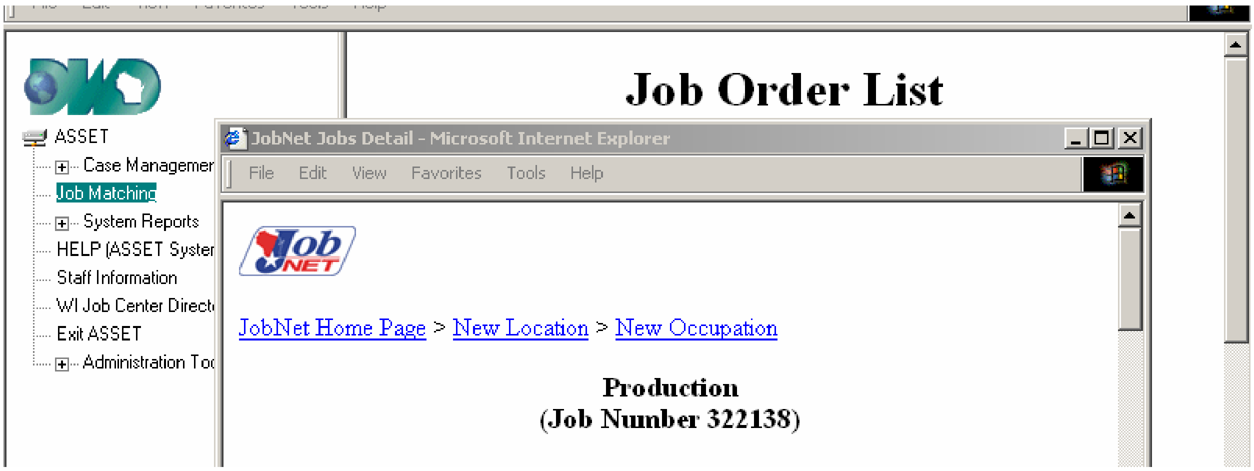
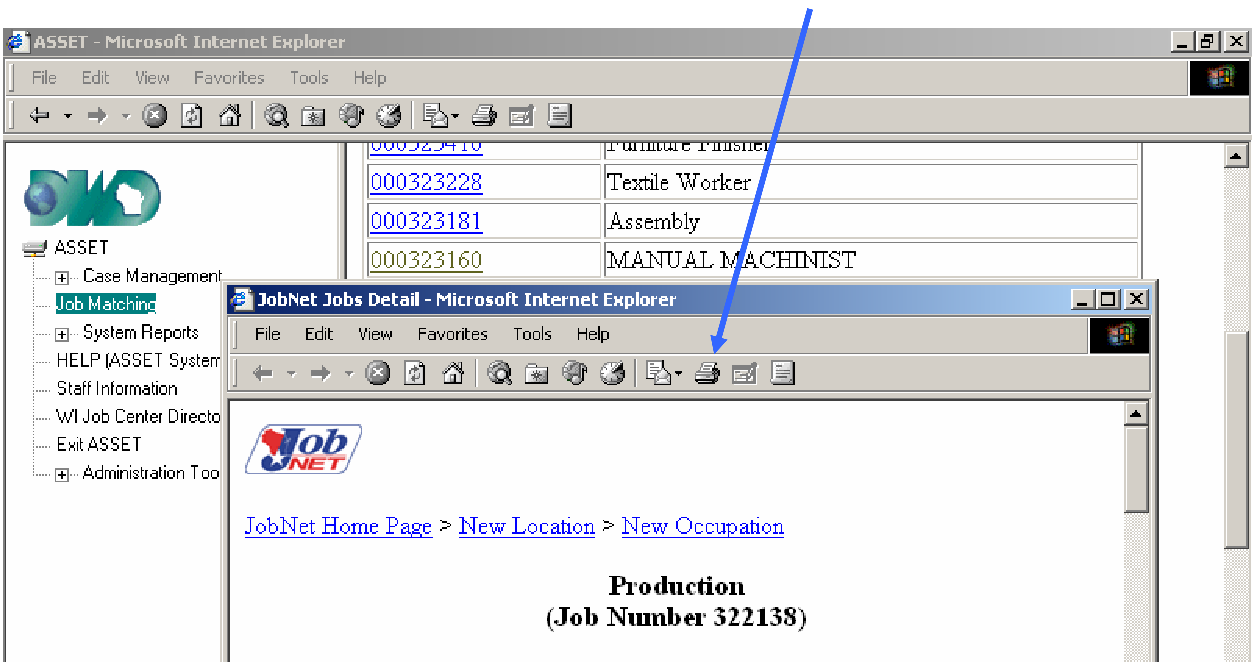
4-2 ____ASSET JOB MATCHING FUNCTION_____



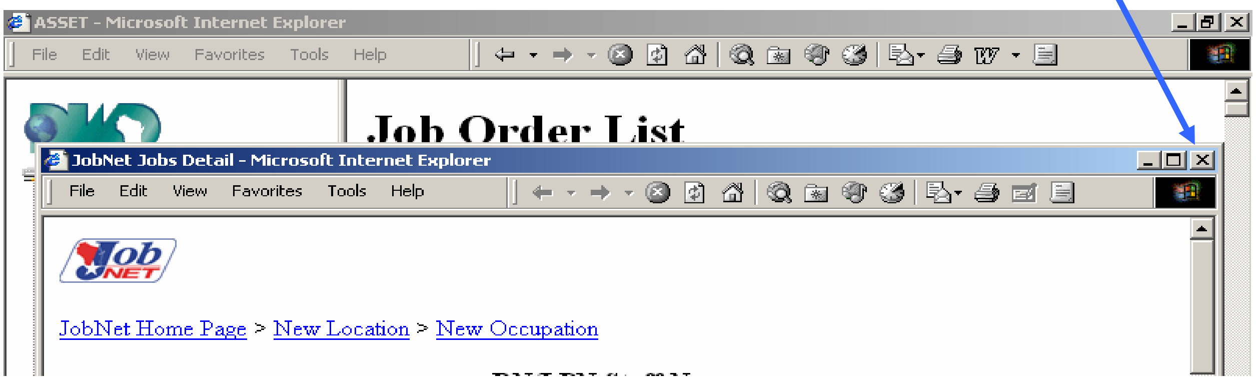
The Case Manager may print the Job Order by clicking on the ***print*** button in the JobNet browser window. The Case Manager may repeat this process for any job order listed.



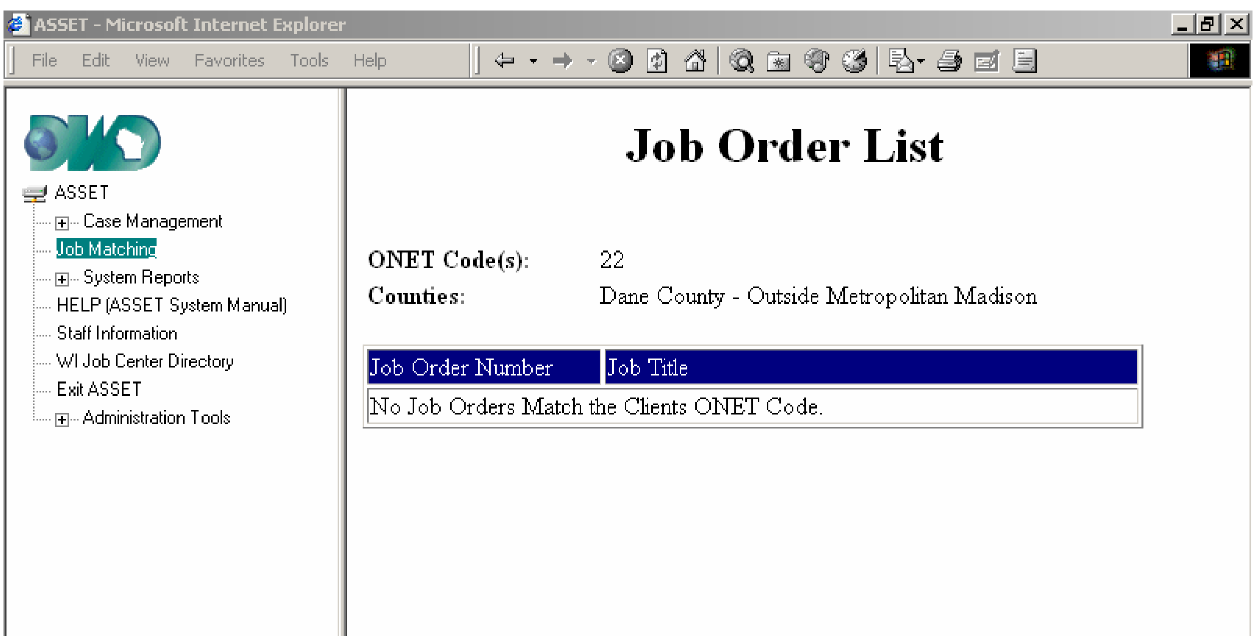
ASSET FUNCTIONALITY

4-2 ____ASSET JOB MATCHING FUNCTION_____

To close the job order, click on the X (close) button on the ***JobNet browser session***. The user is returned to the ASSET session.



If there are no current job openings on JobNet with this O*NET code for the location(s) selected, the following page displays:



After completing Job Matching, any referrals to an open job order should be documented by the Case Manager, in ASSET, under Manage Services. The worker may directly navigate to Manage Services (Case Management Function), and select this same customer for reporting the Job Referral as a Core Staff Assisted Service. If multiple job referrals are provided, each Job Order Number should be recorded.

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