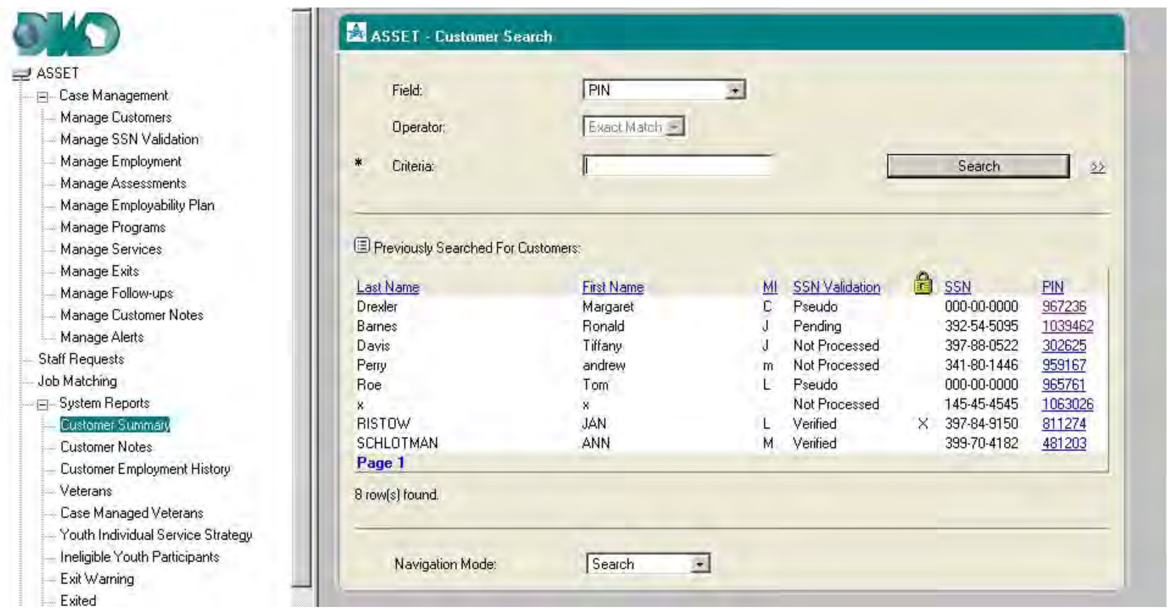
ASSET Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____

The **Customer Summary Report** gives workers a summary of a specified customer record. The report is intended to provide workers with a snapshot of all the ASSET information recorded for that customer. Click on the print icon on the browser to print the report.

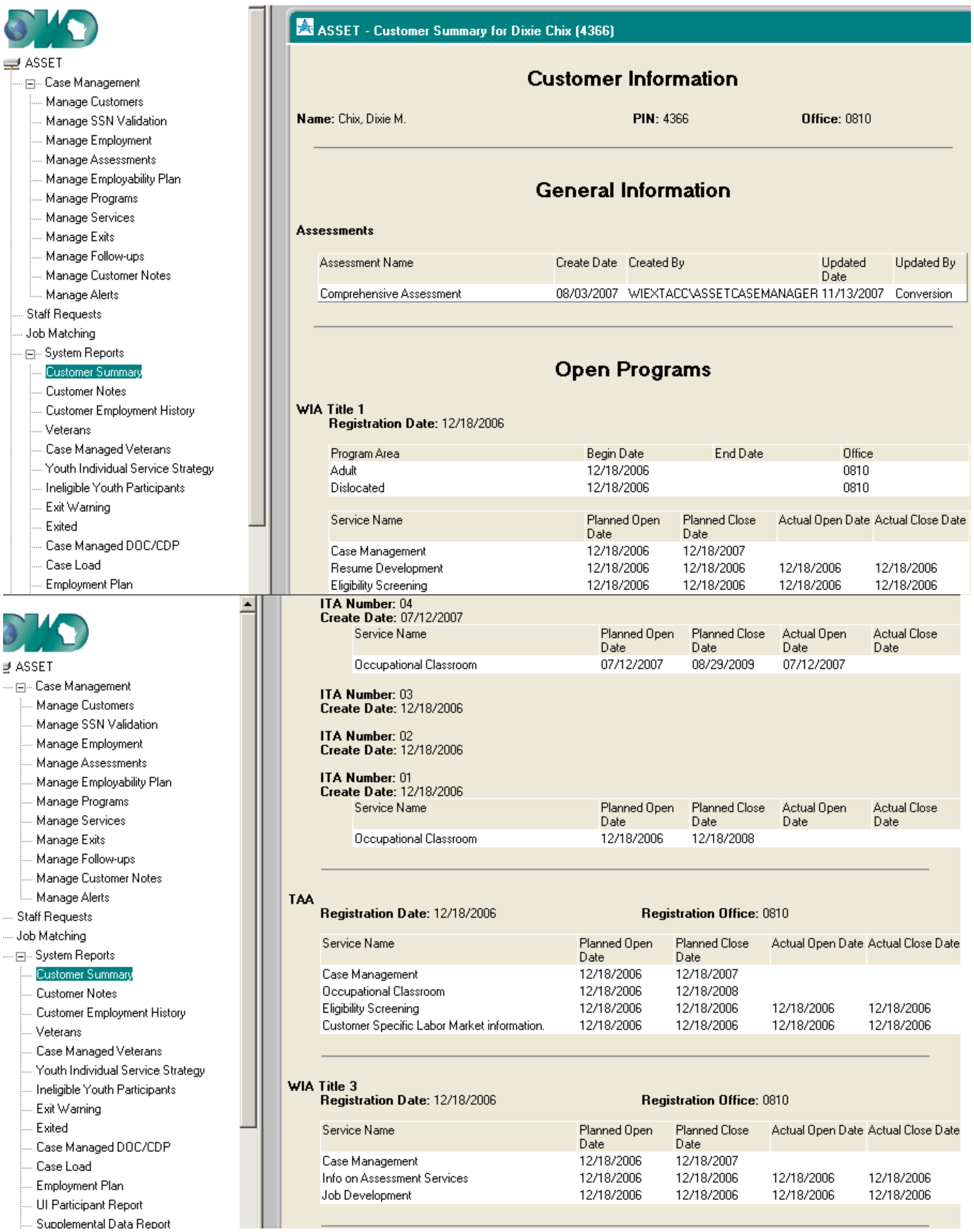
The report can be accessed by first clicking on the plus sign (+) under Systems Report on the Menu Tree. Next click on the Customer Summary option, then select a customer from the list of Previously Searched for Customers or find a new customer using the Search function.



ASSET Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____



ASSET - Customer Summary for Dixie Chix (4366)

Customer Information

Name: Chix, Dixie M. **PIN:** 4366 **Office:** 0810

General Information

Assessments

Assessment Name	Create Date	Created By	Updated Date	Updated By
Comprehensive Assessment	08/03/2007	WIEXTACC\ASSETCASEMANAGER	11/13/2007	Conversion

Open Programs

WIA Title 1
Registration Date: 12/18/2006

Program Area	Begin Date	End Date	Office
Adult	12/18/2006		0810
Dislocated	12/18/2006		0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Resume Development	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Eligibility Screening	12/18/2006	12/18/2006	12/18/2006	12/18/2006

ITA Number: 04
Create Date: 07/12/2007

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Occupational Classroom	07/12/2007	08/29/2009	07/12/2007	

ITA Number: 03
Create Date: 12/18/2006

ITA Number: 02
Create Date: 12/18/2006

ITA Number: 01
Create Date: 12/18/2006

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Occupational Classroom	12/18/2006	12/18/2008		

TAA
Registration Date: 12/18/2006 **Registration Office:** 0810

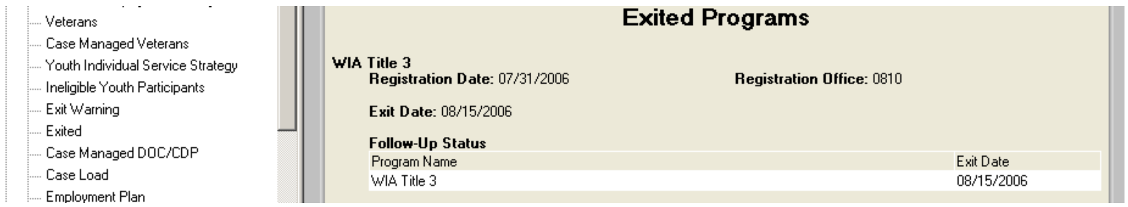
Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Occupational Classroom	12/18/2006	12/18/2008		
Eligibility Screening	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Customer Specific Labor Market information.	12/18/2006	12/18/2006	12/18/2006	12/18/2006

WIA Title 3
Registration Date: 12/18/2006 **Registration Office:** 0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Info on Assessment Services	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Job Development	12/18/2006	12/18/2006	12/18/2006	12/18/2006

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____



Once the customer is selected, the **Customer Summary Report** displays for that person. The Customer Summary includes four sections:

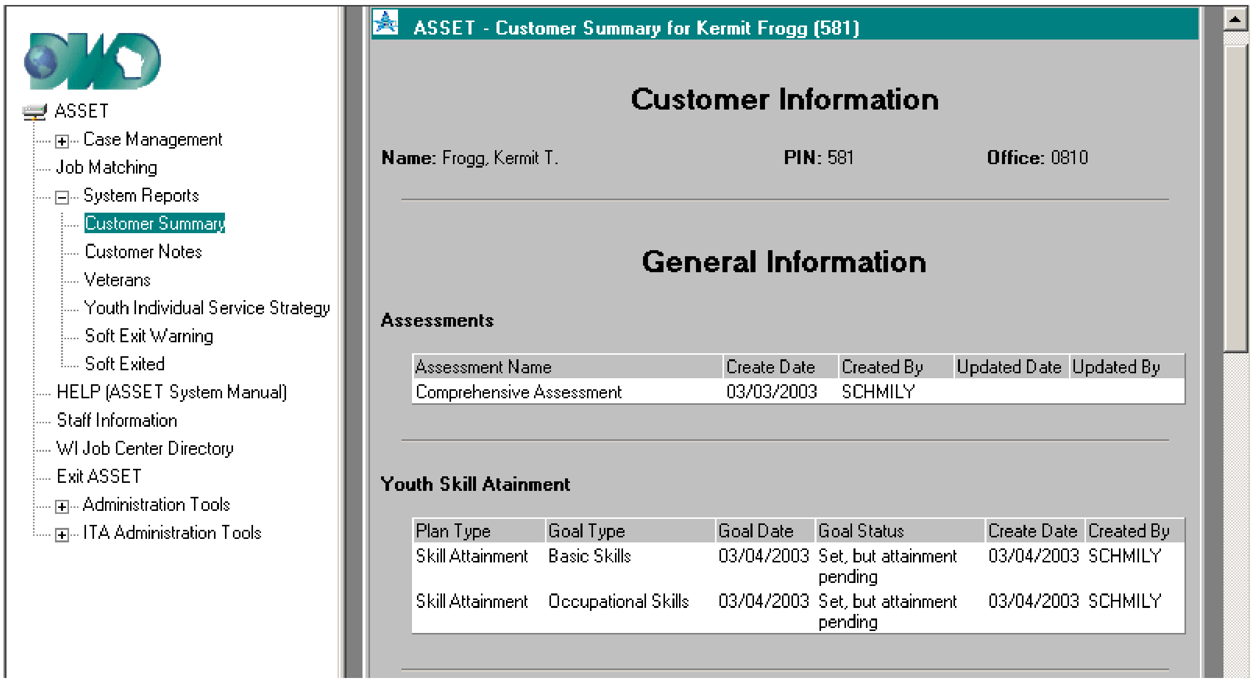
1. Customer Information – Name, PIN and Office Number of the Customer Record
2. General Information – Includes information that would display on the following menu functions:
   - Manage Assessments - Comprehensive Assessment
   - Manage Employability Plans – Youth Skill Attainment and Individual Training Accounts
3. Open Programs – Includes information for each of the Programs – WIA Title 1, WIA
4. Exited Programs – Includes information for Title 3 and TAA and the list of services that were provided under each program, each exited program and the services associated with each.

The page is dynamically created for each person and what appears on the page depends on what is recorded in ASSET. Below is a sample of Customer Summary page with only Assessment and Youth Skill Attainments in the General Information section:

ASSET Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____

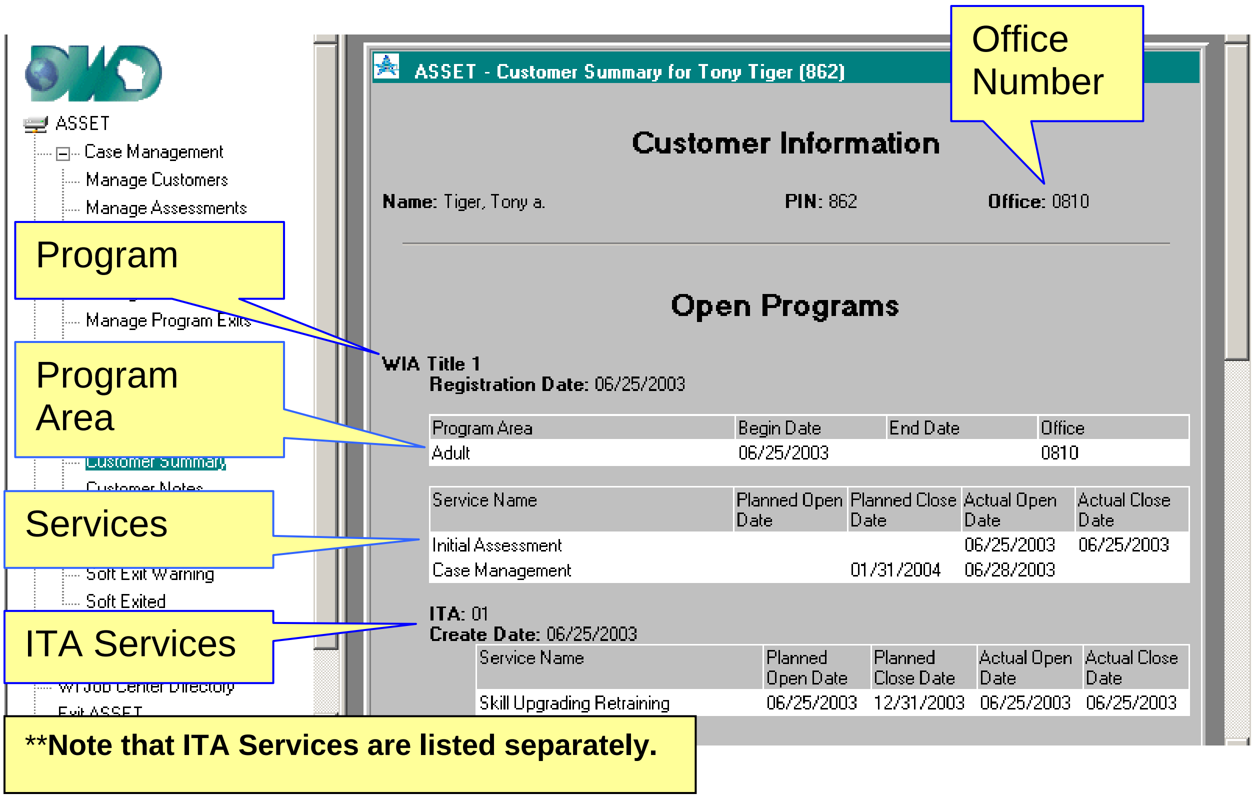


In the Open Programs section, each Program is displayed separately and the services reported within that program also are shown. For WIA Title 1, the Registration Date is shown, followed by the Program Area information, including the Office Number listed for that Program Area.

ASSET Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____

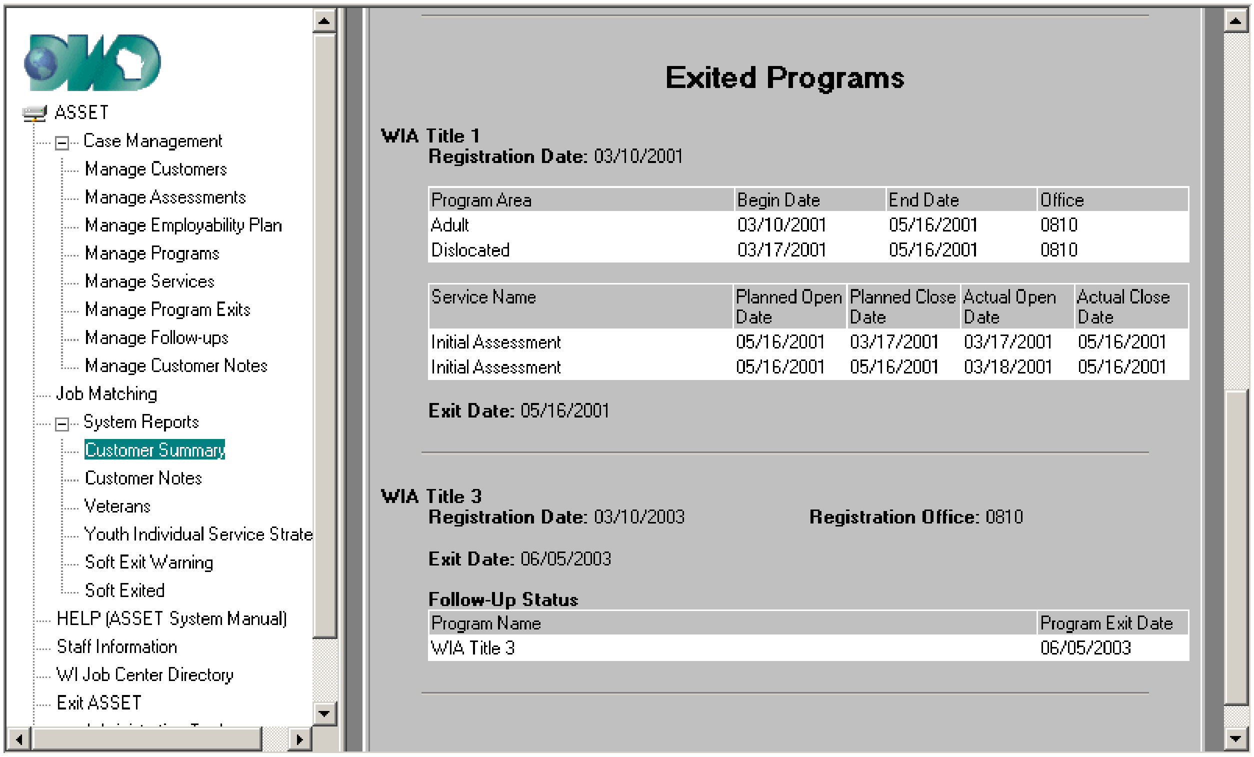


The last section of the Customer Summary is for Exited Programs and the services that were provided during that episode of program participation. Here is an example of the Exited Programs Section.

ASSET Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____CUSTOMER SUMMARY REPORT_____



Note that the Exit Date is shown as well as the Registration Date. Follow-Up Status information also displays under the Exit, if one exists.

There are no direct links to the person's record in any of the ASSET functions, although this person will be the first on your list of Previously Selected Customers should you wish to move to another function.

Return to Index – Click Here

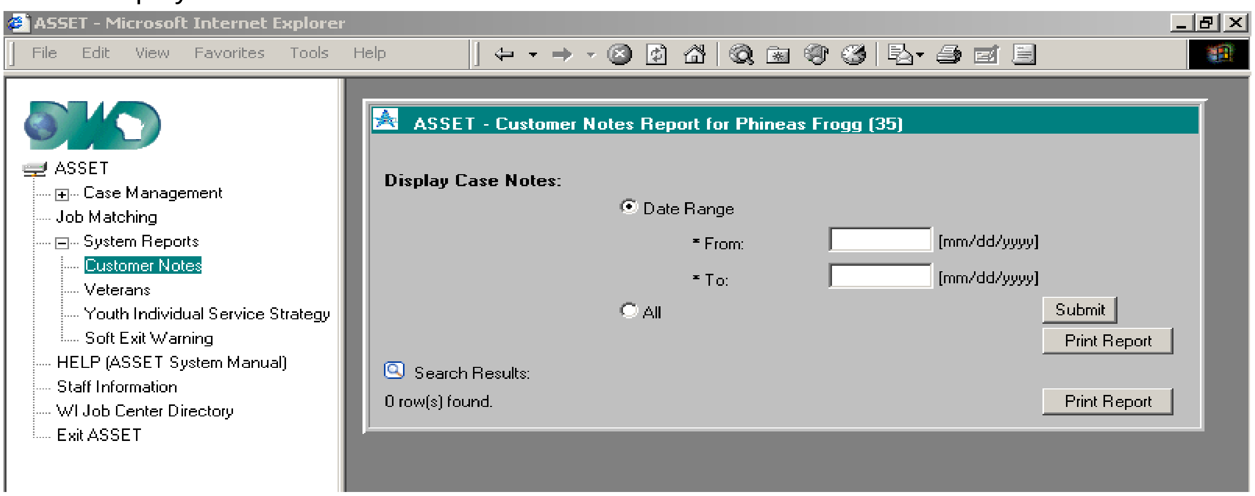
ASSET Users' Guide

ASSET SYSTEM REPORTS

5-2 CUSTOMER NOTES

The **Customer Notes Report** gives a case manager an opportunity to create a listing of Customer Notes in a format where a worker can see all the narratives and print the notes in their entirety.

To access the Customer Notes Report, open the Systems Reports by clicking on the plus sign (+) on the Menu Tree. Next, click on the Customer Notes Report option. Begin by selecting a customer from the list of Previously Searched for Customers, or find a new customer using the Search function. Once a customer is selected click on that individual's PIN. The following page is then displayed:



This options box allows the worker to choose how the report is to be created. These are the fields.

FIELD	DESCRIPTION
• **Date Range**	Click on this radio button if only specified notes need to be retrieved. Enter the dates (From and To) of the Customer Notes desired. The date format must be correct.
• **All**	Click on this radio button if all the Customer Notes associated with this customer are to be retrieved.

Click on the Submit button and a page is returned with all the Customer Notes requested. The Print Report button allows for the printing of all the selected notes.

[Return to Index – Click Here]

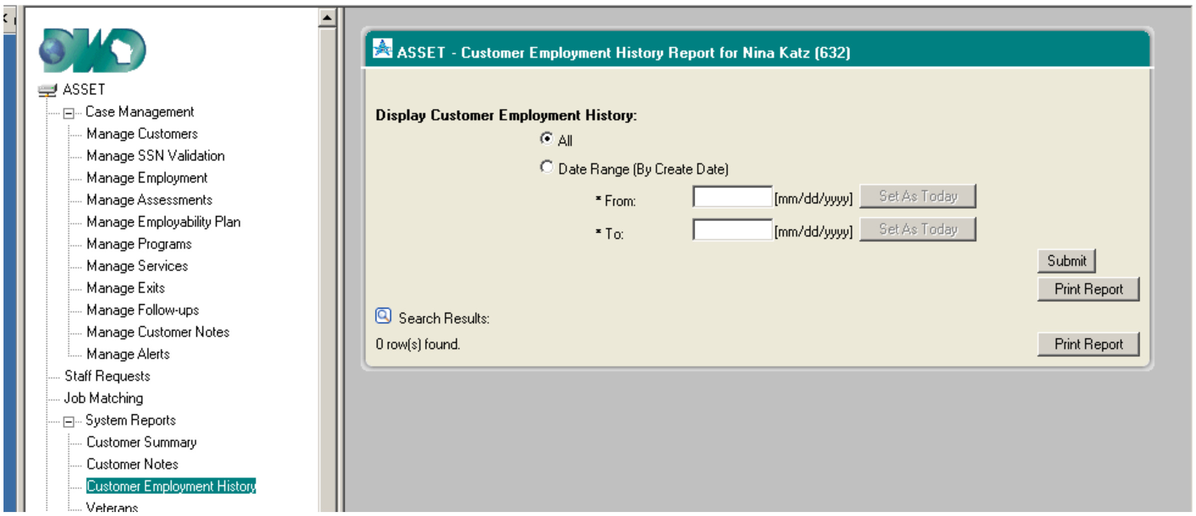
Users' Guide

ASSET SYSTEMS REPORT

5-3 ____CUSTOMER EMPLOYMENT HISTORY______

The **Customer Employment History Report** is a system report that provides workers with the ability to print a complete work history that reflects the information that was recorded under Manage Employment in ASSET.

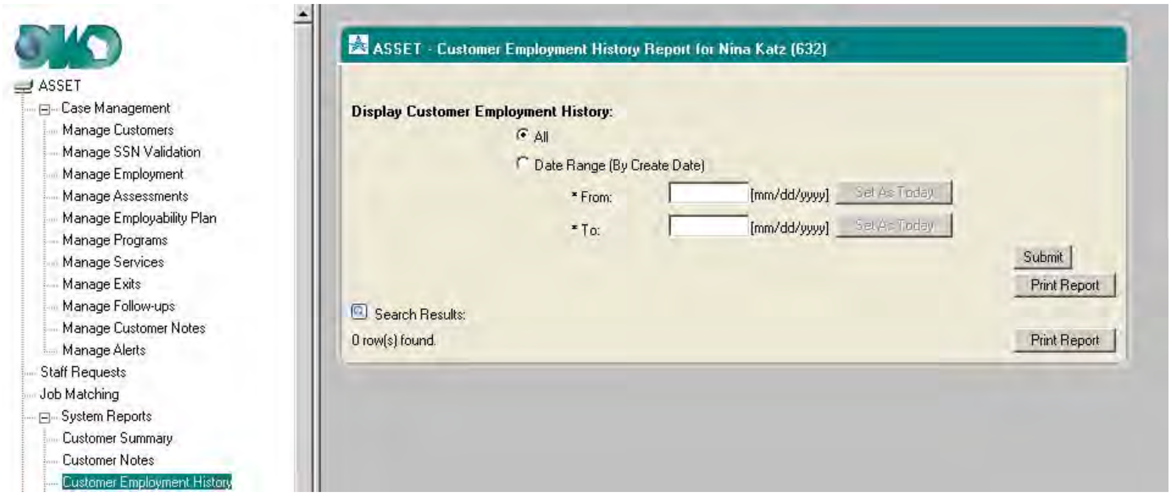
To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu Tree, then click on the Customer Employment History option. The page will look like this.



There are two options to choose from when selecting Employment History information. The report can be for **All** the employment information currently on the Manage Employment page, or for a **Specified Date Range** (By Create Date). If a Date Range is selected, a worker will need to indicate the From and To dates.

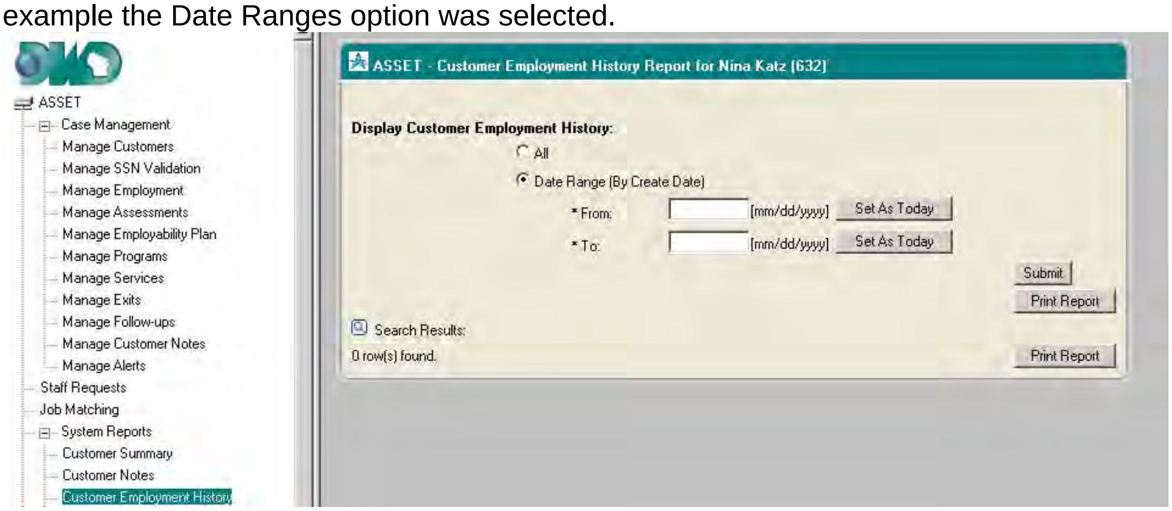
ASSET SYSTEMS REPORT

5-3 ____CUSTOMER EMPLOYMENT HISTORY______



The report page for the customer above shows that the worker selected **All** as the date range field by which to conduct the Employment History Search.

The example below reflects the Employment History if the Date Range option is chosen. In this example the Date Ranges option was selected.



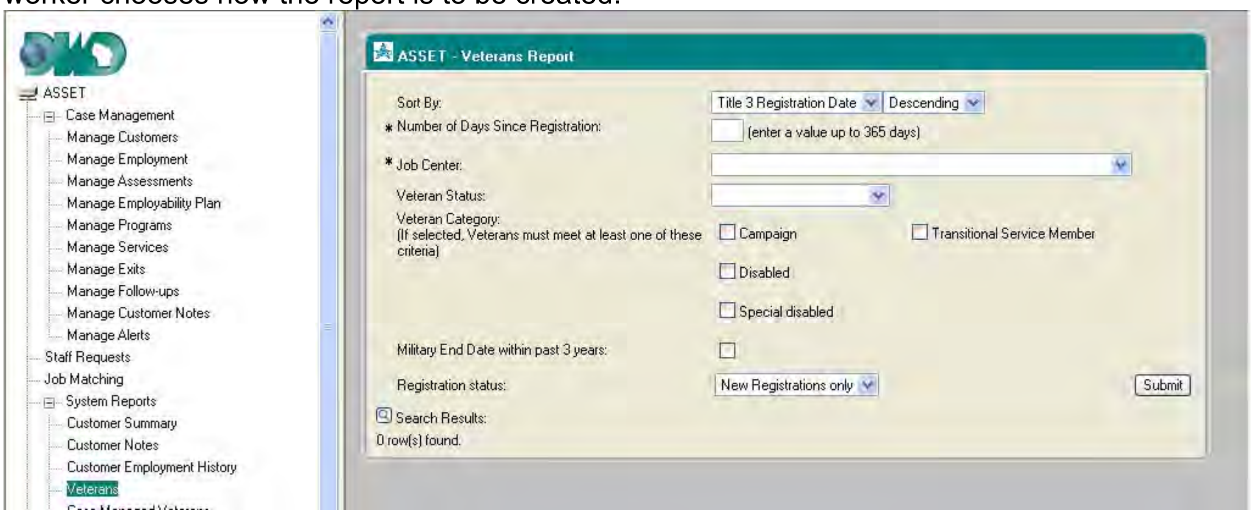
[Return to Index-Click Here]

ASSET SYSTEMS REPORTS

5-4 _____VETERANS REPORT_____

This **Veteran's Report** gives the Veteran's staff an opportunity to create a listing of all customers who are veterans, based on the criteria selected at a specified point in time. There are several options for the worker to choose to limit their search of the database.

To access the Veterans Report, open the Systems Reports by clicking on the plus sign (+) on the Menu Tree, then click on the Veterans Report option. This opens a selection box where the worker chooses how the report is to be created.



The Field Descriptions Are:

FIELD	DESCRIPTION
• **Sort By:**	This is used to select the sort order when displaying. The options are to list in either **Descending** or **Ascending** order by: • Title 3 Registration Date • Customer Name • PIN • O*NET Code For example, if an alpha list of customers is desired, select Customer Name and Ascending.

ASSET SYSTEMS REPORTS

5-4 _____VETERANS REPORT_____

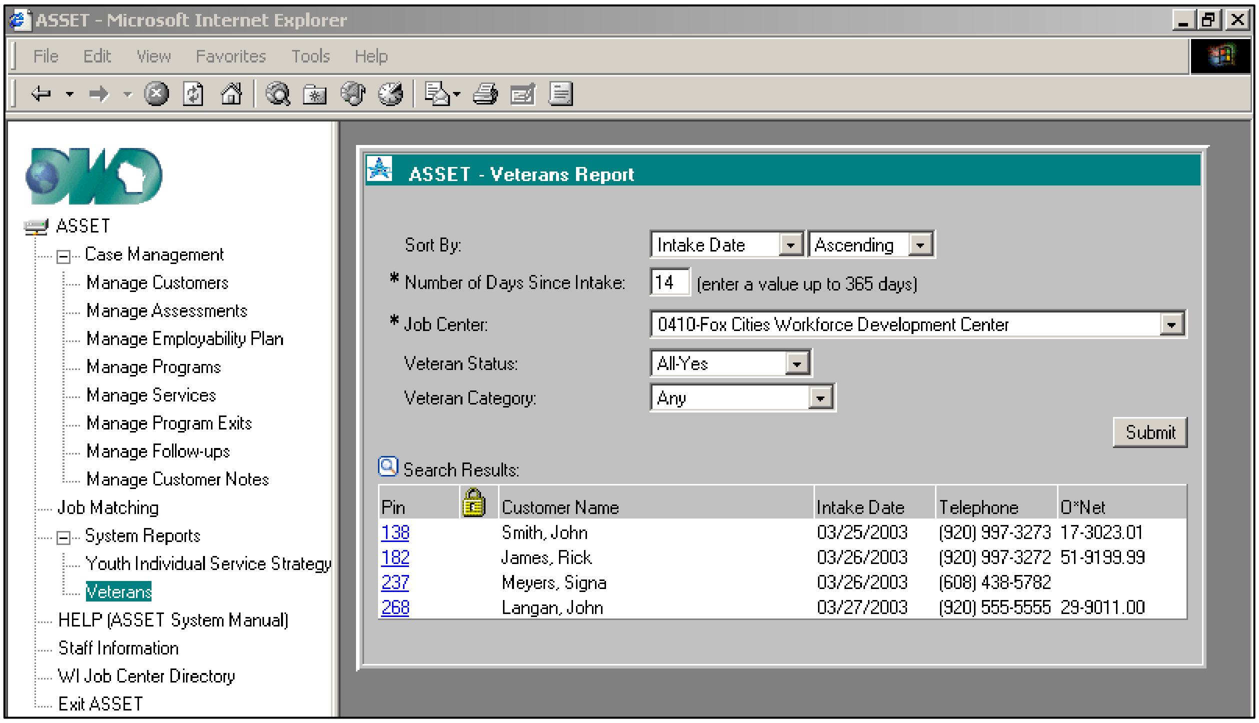
FIELD	DESCRIPTION
• **Number of Days Since Registration:**	Each customer has an Intake Date. This allows workers to choose the number of days (up to 365) back to include in the listing. For example, to get all new intakes in the last five days, put 5 in the field
• **Job Center:**	Select from the dropdown the Job Center for which the listing is requested.
• **Veteran Status:**	Select from the dropdown the status of Veteran desired. • Yes – less than 180 days active service • Yes – more than 180 days active service • Yes – All (combines both of the above) Selecting a response grays out the Transitional Service Member category in the Veteran Category field.
• **Veteran Category:**	Select from the category of veteran for the listing. The options are: • Campaign • Transitional Service Member • Disabled • Special Disabled
• **Military End Date Within Past 3 Years**	Click on this field if the Veteran military end date was within the past 3 years.
• **Registration Status**	Select the Registration Status for the listing. The options are: ▪ New Registrants Only ▪ Re-Registrations Only ▪ Any

Users' Guide

ASSET SYSTEMS REPORTS

5-4 _____VETERANS REPORT_____

Click on the Submit button to obtain a list of the veterans that meet the criteria selected by the worker. Going to File > Print (Ctrl + P) or clicking on the Print icon will print the listing.



Worker's also have the option of clicking on the PIN for any individual shown on the list to go directly to that person's Customer Record.

[Return to Index – Click Here]

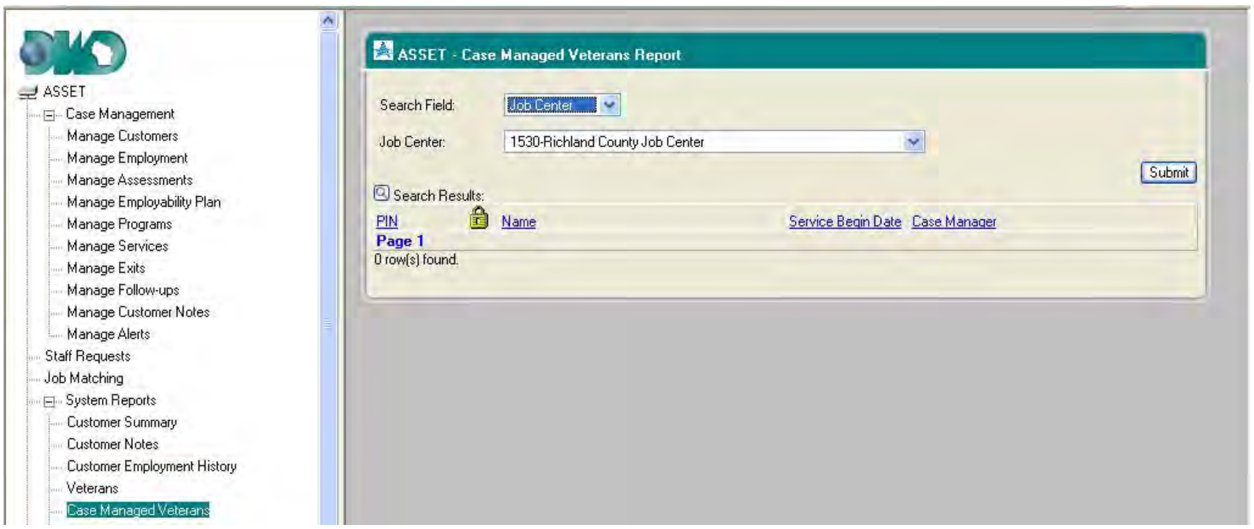
ASSET Users' Guide

ASSET SYSTEM REPORTS

5-5 _____CASE MANAGED VETERANS____

The **Case Managed Veteran's Report** provides Veteran Staff with a list of individuals that are actively being case managed. A Case Managed Veteran is an individual who is enrolled in a service that is beyond the Core Self/Informational level (needs to be at a Core Staff Assisted level to count).

To access this report, open the System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on the Case Managed Veteran function. It looks like this.

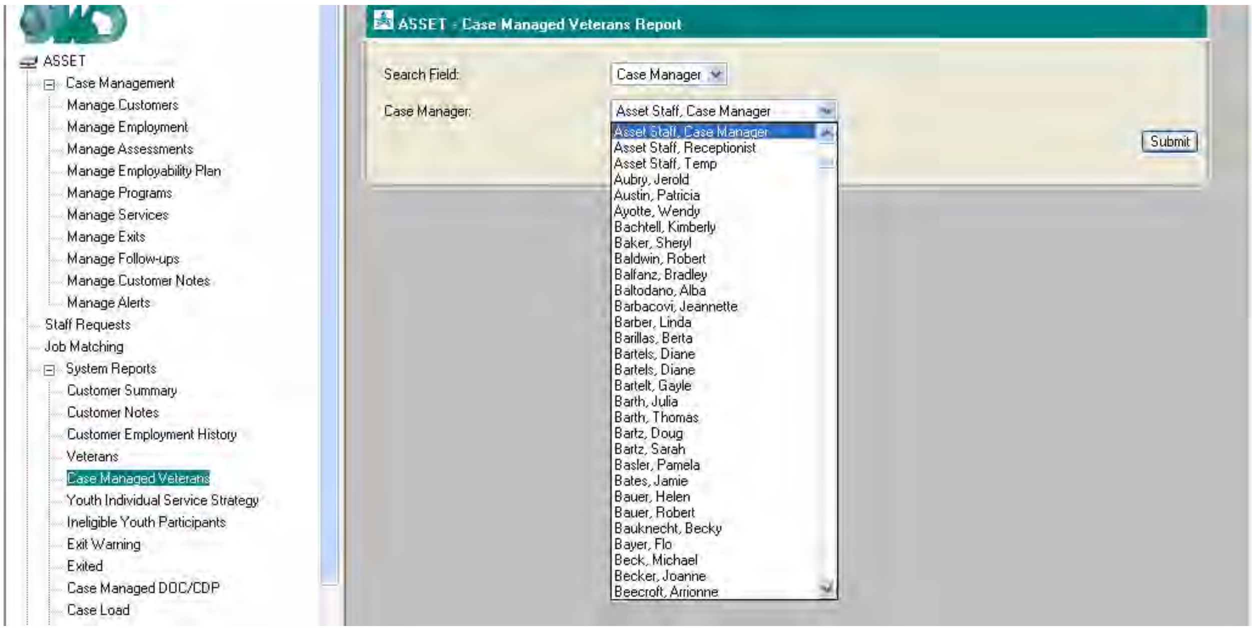


At the Search Field, a case manager may choose either Job Center or Case Manager as the criteria for their report. If the Search Field criteria selected is Case Manager, a listing of case managers is returned from which to select from. Next, click on the submit tab, the report returned looks like the one below.

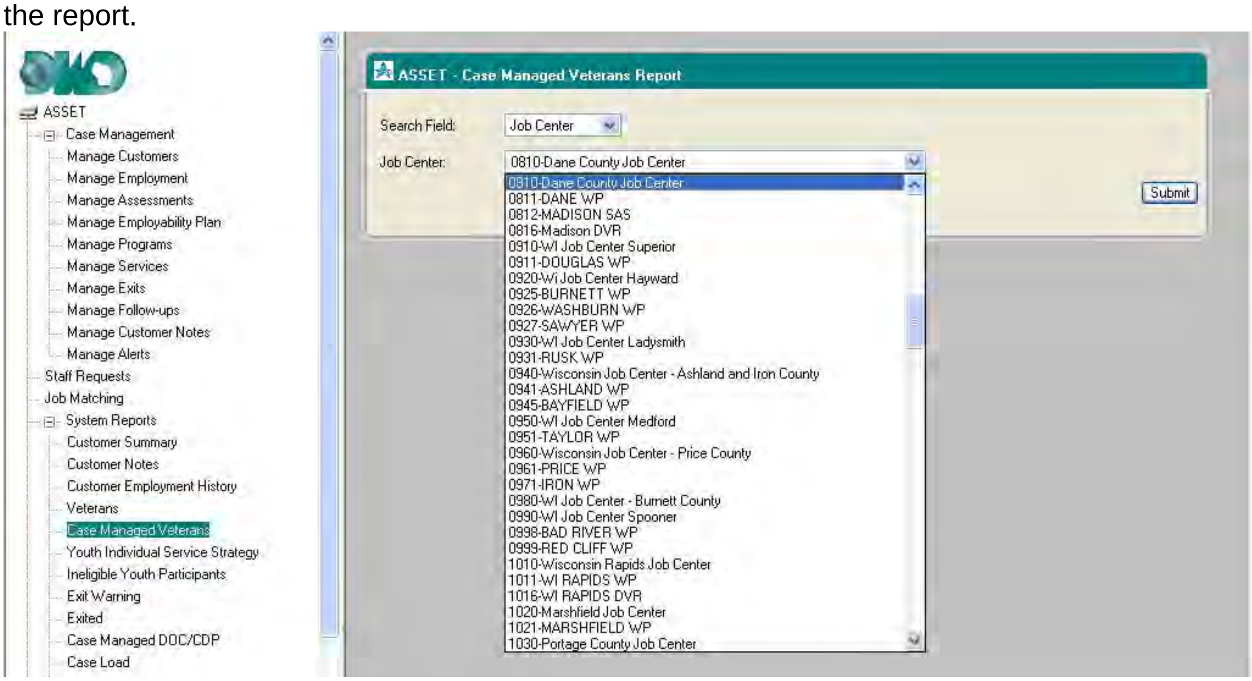
Users' Guide

ASSET SYSTEM REPORTS

5-5 _____CASE MANAGED VETERANS____



When the Search Field selected is Job Center, a list of Job Centers is provided for you to choose from. Select the appropriate Job Center and then click on the submit button to obtain the report.

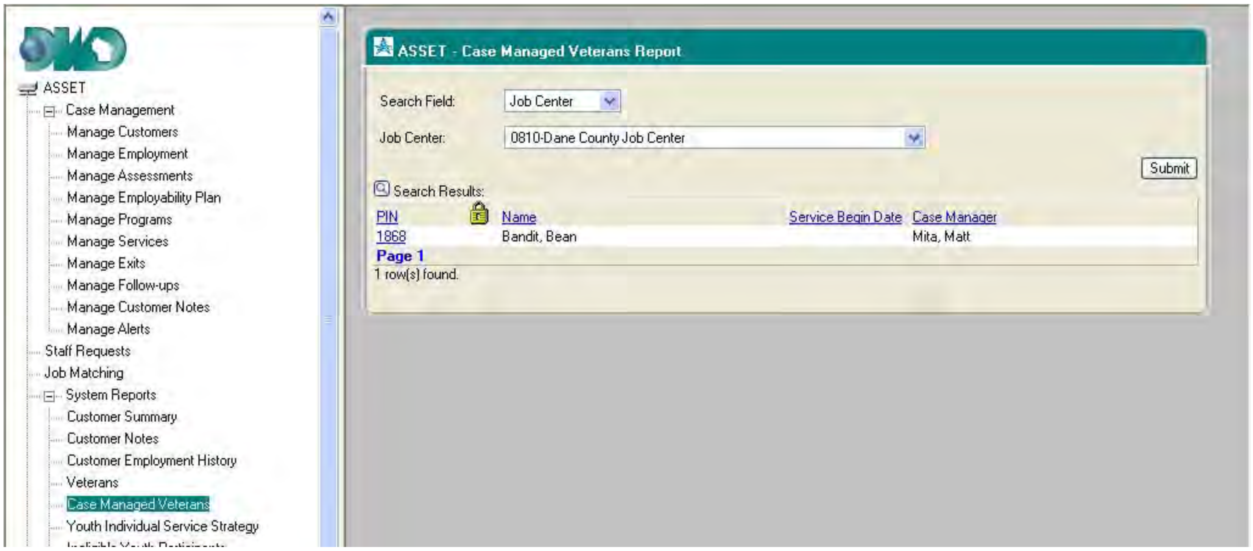


Users' Guide

ASSET SYSTEM REPORTS

5-5 _____CASE MANAGED VETERANS____

The report returned contains the PIN, Name (Last Name, First) Service Begin Date and the Case Manager (Name).



The columns on both reports are sortable. Click on the Highlighted column to change how the data is sorted. Case Manager's should note that once all activities are ended, the name of the individual will be automatically removed from the Case Managed Veteran report**.**

[Return to Index-Click Here]

ASSET Users' Guide

ASSET SYSTEM REPORTS

5-6 _____YOUTH INDIVIDUAL SERVICE STRATEGY_____

Access the **Youth Individual Service Strategy Report**, by clicking on the plus sign (+) under Systems Report, on the ASSET Menu Tree. Next, select a customer from the list of Previously Searched For Customers or find a new customer using the Search function.

This online report is the print-ready version of the Individual Service Strategy for the WIA Youth Program Area. ASSET pulls the required data from areas within ASSET to create the report.

The Field Area Descriptions Are:

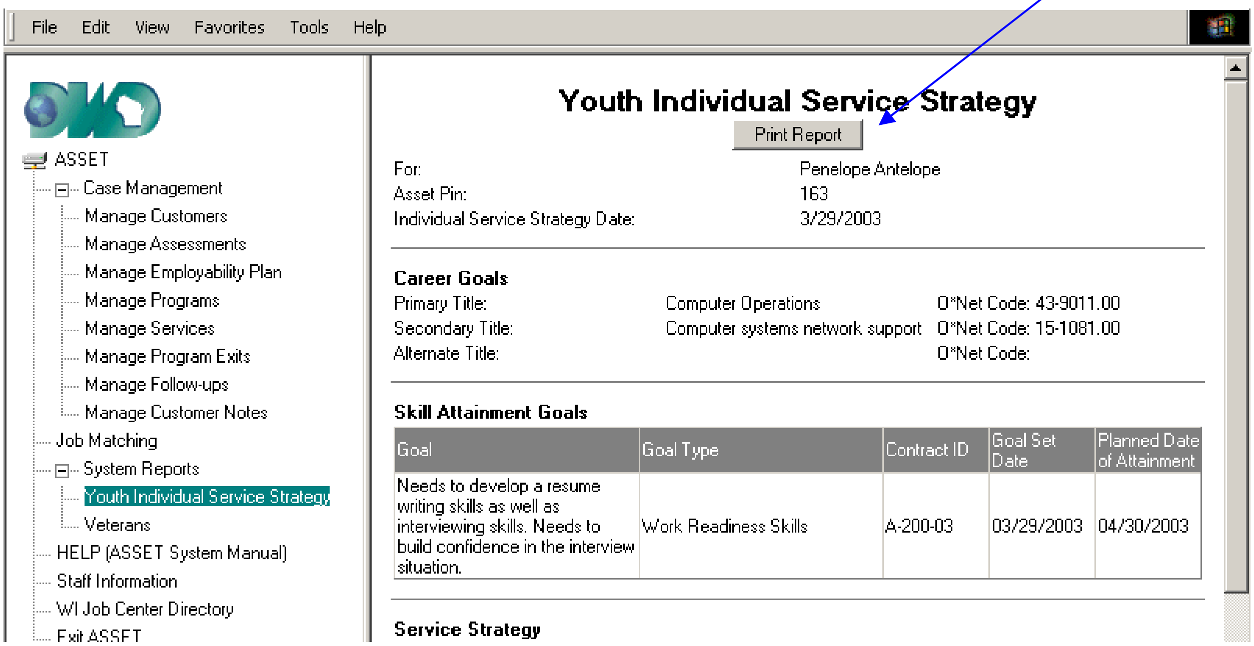
FUNCTION	DOCUMENT	DATA ELEMENTS
Manage Assessments	Comprehensive Assessment	Employment/Career Goals Job Titles/O*NET Codes
Manage Employability Plans	Youth Skill Attainment	Goal Type, Goal, Contract ID, Goal Set Date, Planned Date of Attainment for all goals that have a Goal Attainment Status of Set, Attainment Pending.
Manage Services	Youth Services	Lists all Youth Services that are open, meaning the service has a Planned Service Close Date (but no Actual Service Close Date).

ASSET Users' Guide

ASSET SYSTEM REPORTS

5-6 _____YOUTH INDIVIDUAL SERVICE STRATEGY_____

The report adds information such as the customer name and PIN, and creates a signature block for the Youth, Case Manager and Parent signatures. At the top of the display is a Print Report button. Click on this button and the report will print.

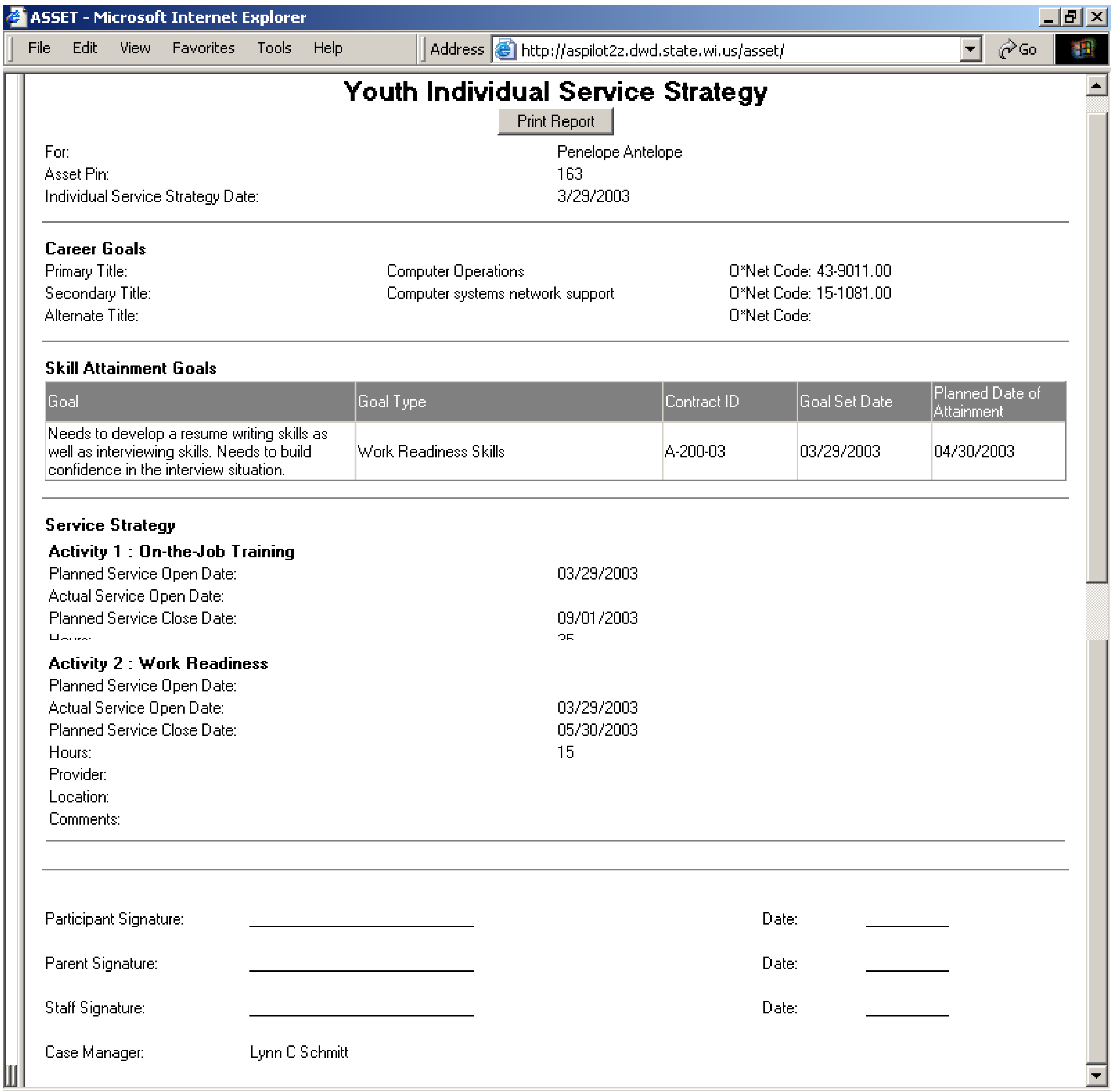


This is a view of a sample report page with all the components shown. If the Case Manager has not completed all the information on the Comprehensive Assessment, Youth Skill Attainment and Services, that section of the report has the basic structure presented, but has no data. The actual printed copy of the report looks very similar.

ASSET Users' Guide

ASSET SYSTEM REPORTS

5-6 _____YOUTH INDIVIDUAL SERVICE STRATEGY_____


ASSET - Microsoft Internet Explorer

File Edit View Favorites Tools Help Address http://aspilot2z.dwd.state.wi.us/asset/ Go

Youth Individual Service Strategy

Print Report

For:	Penelope Antelope
Asset Pin:	163
Individual Service Strategy Date:	3/29/2003

Career Goals

Primary Title:	Computer Operations	O*Net Code: 43-9011.00
Secondary Title:	Computer systems network support	O*Net Code: 15-1081.00
Alternate Title:		O*Net Code:

Skill Attainment Goals

Goal	Goal Type	Contract ID	Goal Set Date	Planned Date of Attainment
Needs to develop a resume writing skills as well as interviewing skills. Needs to build confidence in the interview situation.	Work Readiness Skills	A-200-03	03/29/2003	04/30/2003

Service Strategy

Activity 1 : On-the-Job Training

Planned Service Open Date:	03/29/2003
Actual Service Open Date:	
Planned Service Close Date:	09/01/2003
Hours:	35

Activity 2 : Work Readiness

Planned Service Open Date:	
Actual Service Open Date:	03/29/2003
Planned Service Close Date:	05/30/2003
Hours:	15
Provider:	
Location:	
Comments:	

Participant Signature: ______________________ Date: ________

Parent Signature: ______________________ Date: ________

Staff Signature: ______________________ Date: ________

Case Manager: Lynn C Schmitt

[Return to Index – Click Here]

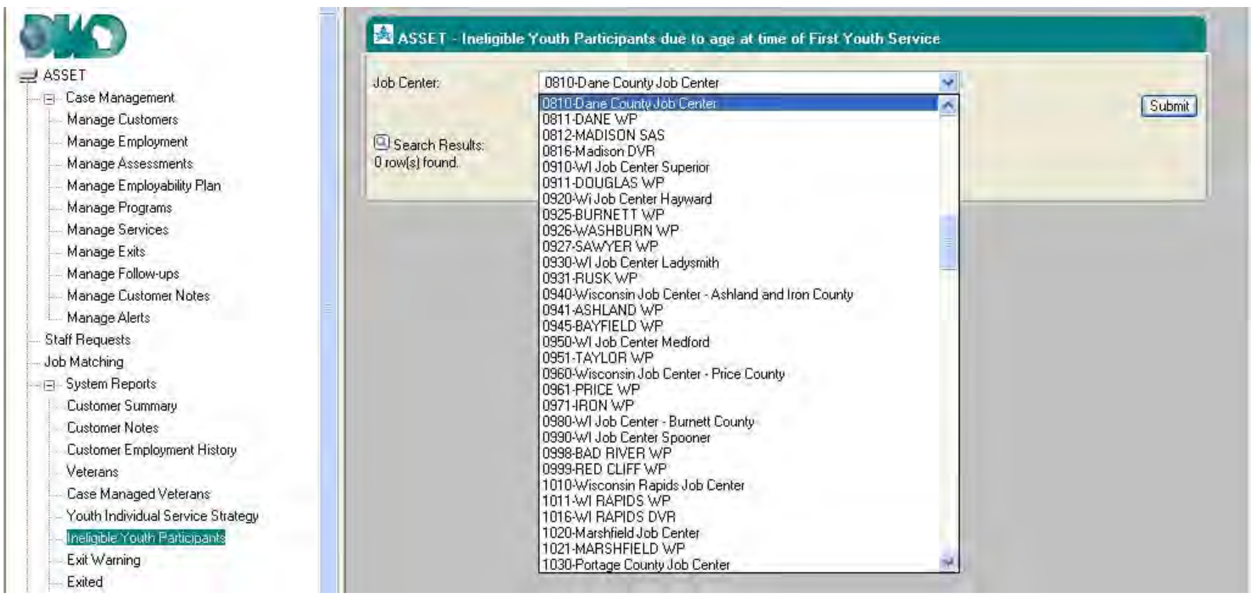
ASSET Users' Guide

ASSET SYSTEM REPORTS

5-7 _____INELIGIBLE YOUTH PARTICIPANTS_____

The **Ineligible Youth Participants Report** can be used by staff to identify individual's who may not be eligible for youth services. The report listing identifies youth whose age at "First Youth Service" is greater then 21. The individual is no longer eligible to participate or receive services under the WIA Title 1 Youth Program.

To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on "Ineligible Youth Participants" from the ASSET menu. The screen returned will look like this:



The default for this report is set to the staff designated office/Job Center. To access the report, select the appropriate Job Center from the Job Center drop-down field.

Next, click on the Submit button. If there are youth who no longer meet the age requirement a report will then be generated for the Job Center selected.

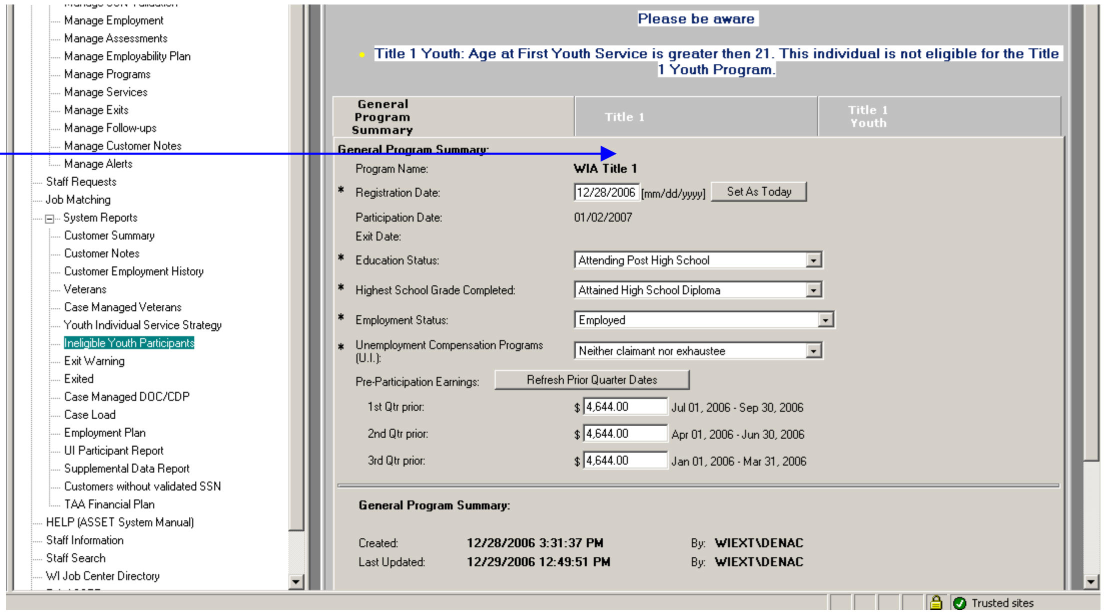
The Search Results returned on this report include the following areas: PIN, Name, Date of First Youth Service, Age at 1st Youth Service, and Case Manager.

When staff clicks on the PIN (hyperlink) the system will navigate to the Title I Program Registration screen. The screen returned looks like the one on the next page.

ASSET Users' Guide

ASSET SYSTEM REPORTS

5-7 ______INELIGIBLE YOUTH PARTICIPANTS______



Notice the message displayed on the screen. It reads: Please be aware - Title 1 Youth: Age at First Youth Service is greater then 21. This individual is not eligible for the Title 1 Youth Program.

Return to Index – Click Here

Users' Guide

ASSET CASE MANAGEMENT FUNCTION

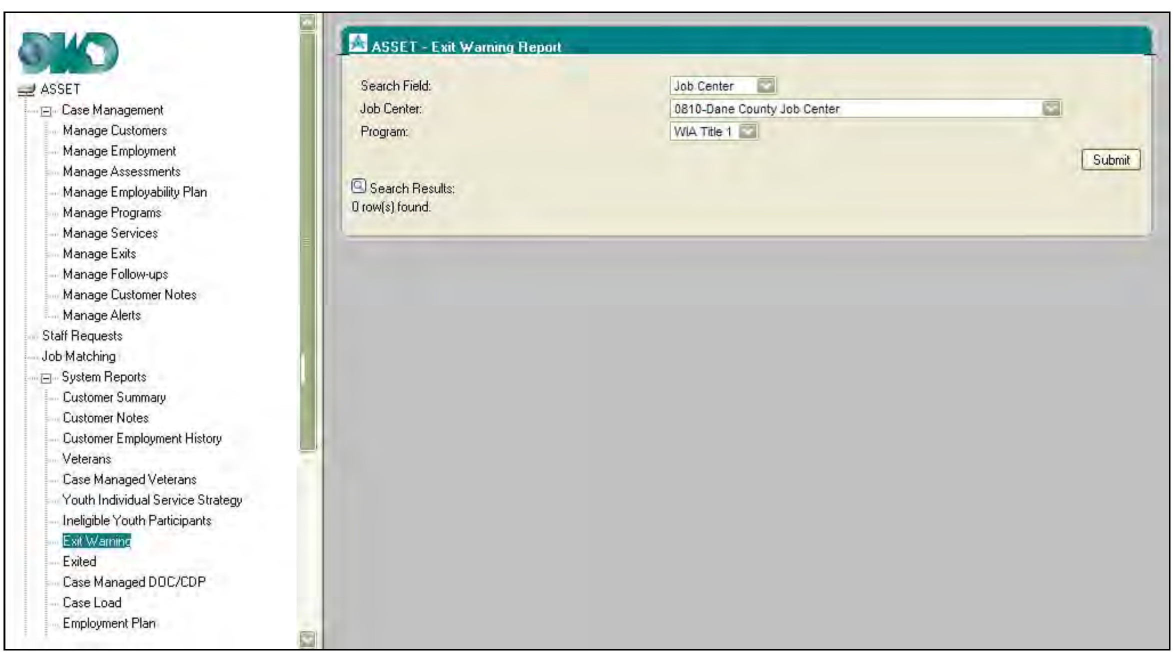
5-8 _____ EXIT WARNING REPORT _____

The Exit Warning Report allows WIA Title 1, TAA, and Title 3 workers to create and view a list of all customers for whom an automatic exit will be created within the next 60 days due to a lack of activity (i.e. no registration date or date of service within the last 90 days) for the episode. This report provides the opportunity for staff to review the programs and services for these individuals and make updates when appropriate to prevent the exit.

The report selects participants based on all the services reported for a customer, or based on the Participation Date if no services exist for the customer. ASSET reads the latest date of all services to find the most recent Planned Service Close Date or Actual Service Close Date. Once that date is determined, ASSET calculates if that date is more than 30 days in the past. If the person has no services, ASSET checks to see if the Participation Date is more than 30 days in the past. In either event, that person could potentially be exited in the next 60 days and ASSET then adds the name to the list. The Exit End Date, which displays on this report, represents the most recent activity and is used by ASSET to calculate the Date Exit Will be Created, that is, the date when 90 days will have passed after that most recent activity.

The Exit Warning Report is a "real time" report, populated with the most current system information available each time a worker opens it.

To access the report, select "Exit Warning" in the Systems Reports left navigation menu. Users can select to conduct a search based on Job Center or Case Manager by specifying one or the other search criterion in the "Search Field."

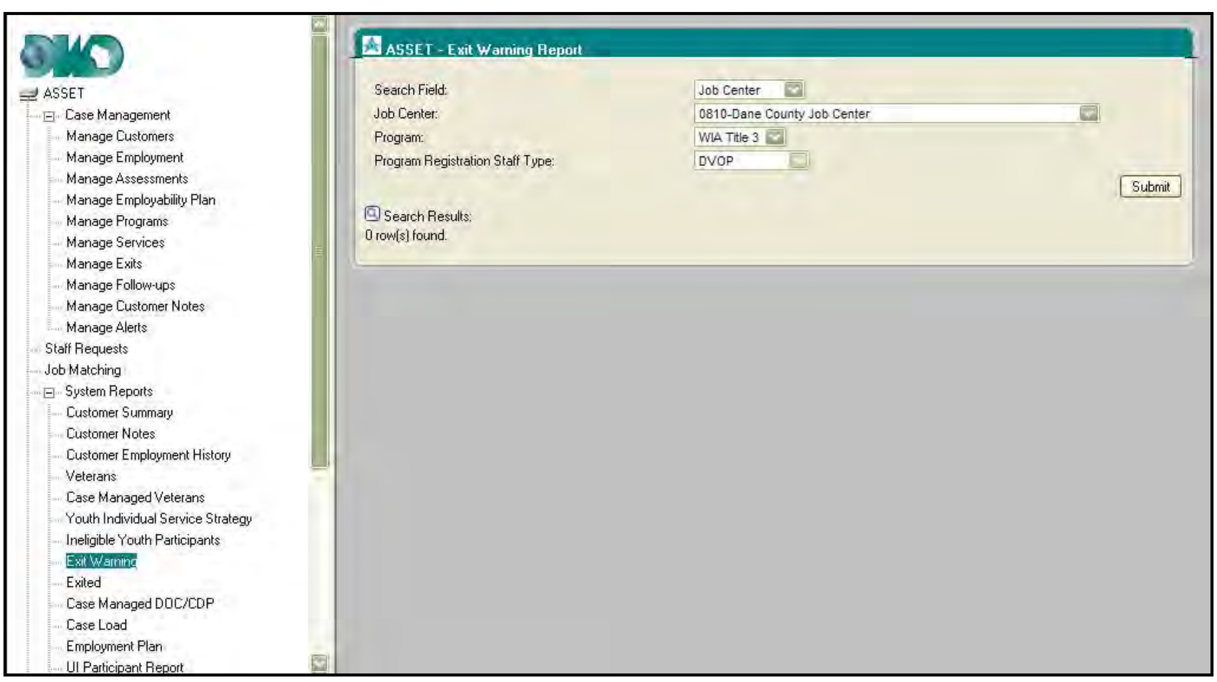


ASSET CASE MANAGEMENT FUNCTION

5-8 _____ EXIT WARNING REPORT _____

The Field Definitions are:

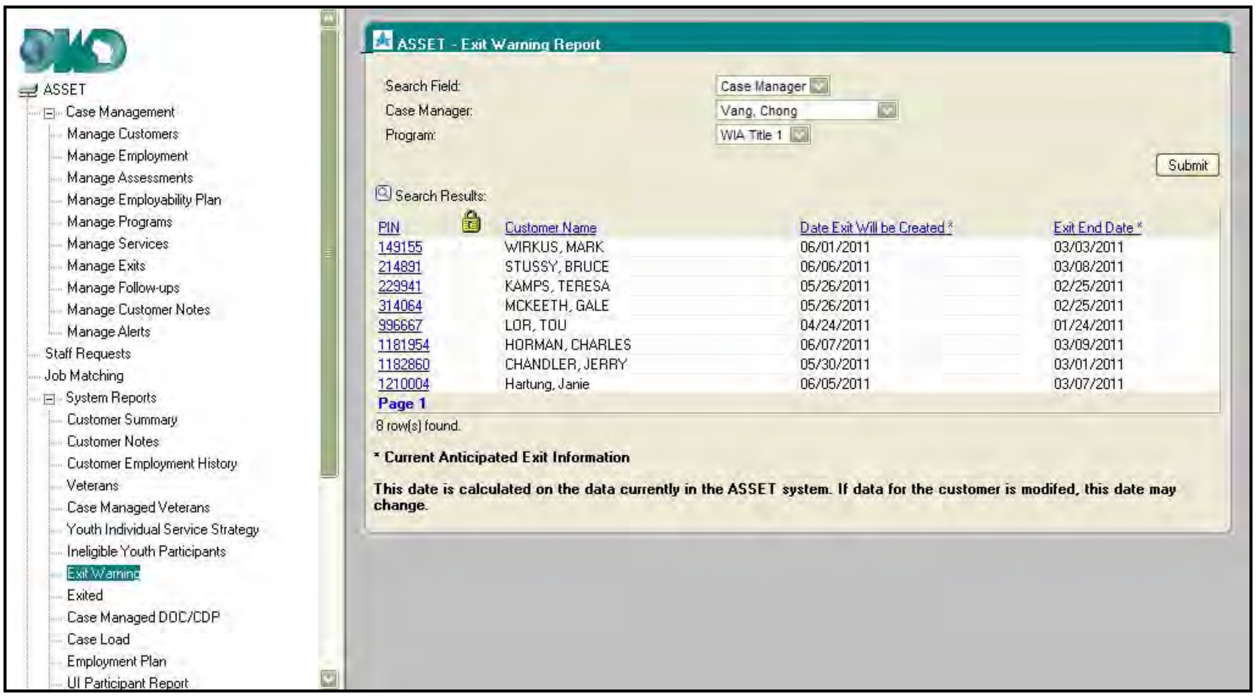
FIELD	DEFINITION
Search Field	Dropdown field from which the user selects Case Manager or Job Center as a search criterion on which to base the search.
Case Manager/Job Center	Dropdown field from which the user selects the specific Case Manager or Job Center for which to conduct the search. Note the field changes from Case Manager to Job Center based on the selection above in the Search Field.
Program	Dropdown field in which the user selects the program for which the listing is being requested.
Program Registration Staff Type	For the Title 3 program, users select either DVOP or LVER as the Program Registration Staff Type in this dropdown field. Note: This field displays **only** when "WIA Title 3" is selected in the Program field above.



ASSET CASE MANAGEMENT FUNCTION

5-8 _____ EXIT WARNING REPORT _____

Clicking on the Submit button generates a list of customers who meet the criteria determined by the worker conducting the search. An example of the Exit Warning Report listing search results based on a Case Manager search is shown below:



A worker has the option of clicking on the PIN to the left of the customer name for any individual shown on the list. This takes the worker directly to that individual's Service Summary screen in ASSET, where the worker can create or extend a service.

Note: To print the list, go to File > Print (Ctrl + P) or click on the Print icon in the web browser. Remember, however, that new names might be added to the list each day. Names are removed once a new service is reported or the Planned Service Close date is extended.

Return to Index – Click Here

ASSET Users' Guide

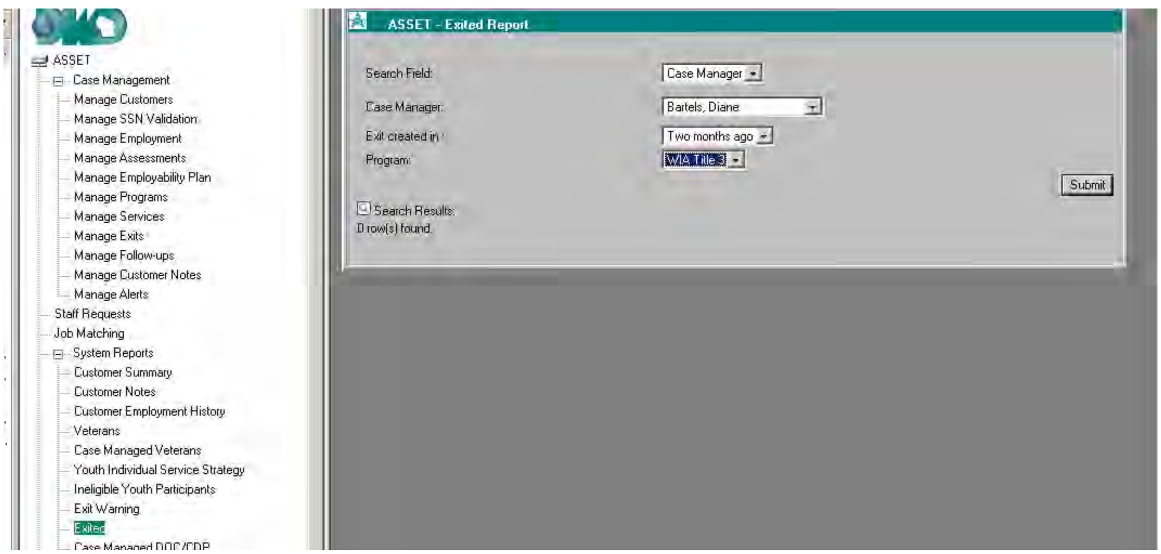
ASSET SYSTEM REPORTS

5-9 _____EXITED REPORT_____

This report provides WIA Title 1, TAA and Title 3 (includes DVOP and LVER for Veterans) staff a list of all customers that were Exited in the Current Month, Last Month, or Two Months ago.

The exits are system-generated after ASSET determines that a participant has not received a service funded by WIA or any partner programs for 90 consecutive calendar days.

The Exited Report is a "real time" report and is recreated with the most current participant information available each time the worker opens it. To access the report, open the Systems Reports by clicking on the plus sign (+) on the Menu Tree, then click on the Exited option.



This opens the selection box where the worker can choose to conduct their Search by Job Center or Case Manager, for the listing. The "Exit Created in" field is the duration to conduct the search for the Exit.   The selection box looks like the one in the above example.

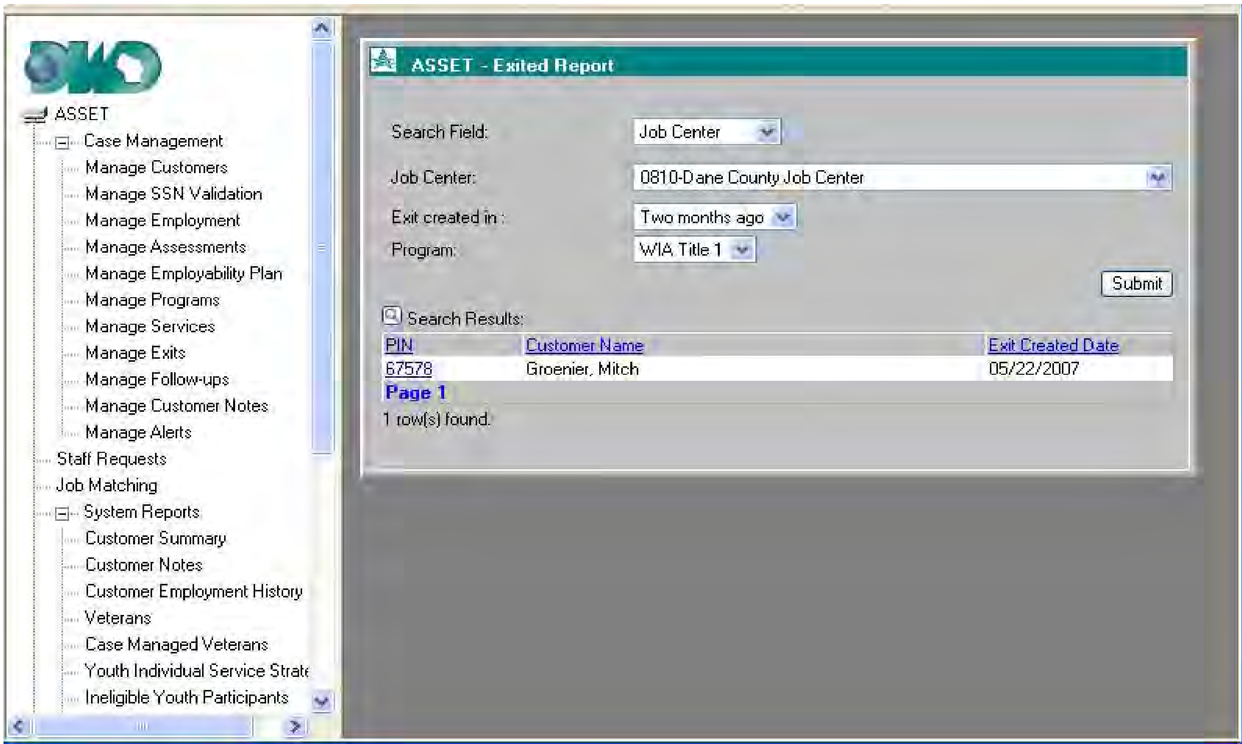
Clicking on the Submit button results in a list being returned that contains the customers that met the criteria selected by the Case Manager as shown on the next page.

.A worker can click on the PIN (hyperlink) to access and view the Exit Details screen in ASSET.

ASSET Users' Guide

ASSET SYSTEM REPORTS

5-9 _____EXITED REPORT_____



The Field Definitions are:

FIELD	DESCRIPTION
• **Search Field**	Select from the dropdown the criteria to conduct the Search. Choose either Job Center or Case Manager.
• **Case Manager or Job Center:**	Select from the dropdown the Case Manager name or Job Center Office number for which the listing is requested.

ASSET SYSTEM REPORTS

5-9 _____EXITED REPORT_____

FIELD	DESCRIPTION
• **Exit Created in**	Select Current Month, Last Month, or Two Months Ago; each option gives the worker a **different** listing of exited participants. "Current month" produces a list of participants who exited one month ago. "Last Month" produces a list of participants who exited two months ago. "Two Months Ago" produces a list of participants who exited three months ago.
• **Program:**	Select the appropriate Program Area to you want to conduct the search by.

Note: Going to File > Print (Ctrl + P) or clicking on the Print icon will print the listing.

Return to Index – Click Here

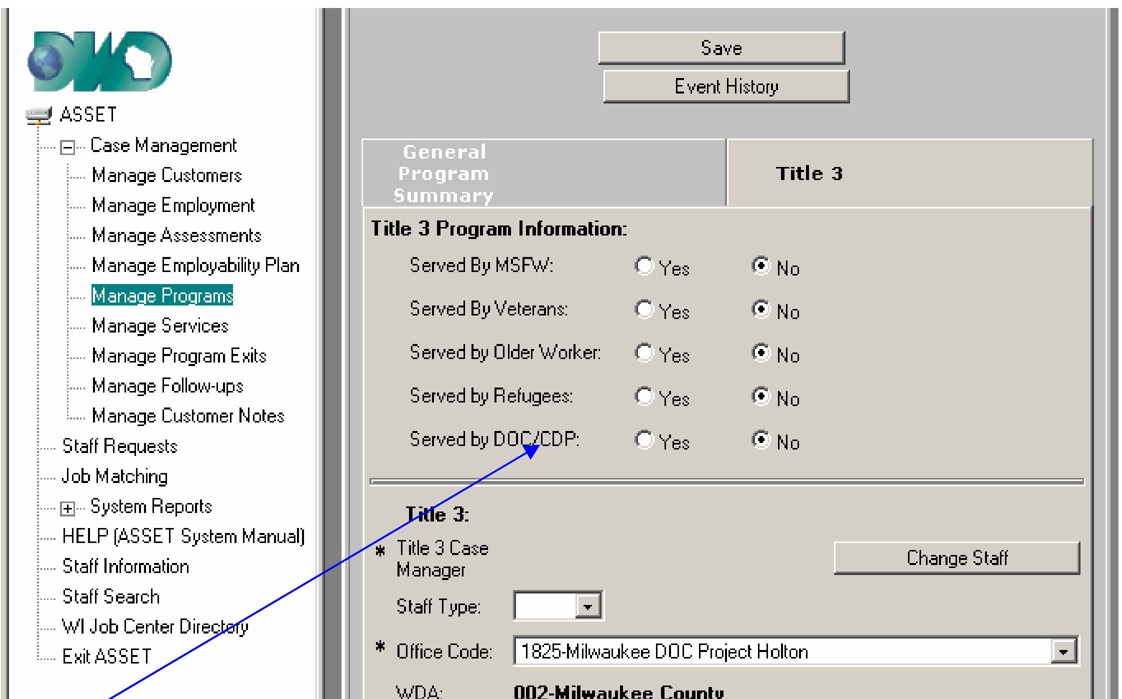
Users' Guide

ASSET SYSTEM REPORTS

5-10 ____CASE MANAGED DOC/CDP____

Currently only inmates from Milwaukee, Racine, Kenosha and Waukesha, who initially participate in an extensive Assessment and Evaluation process at DCI (Dodge Correctional Institution) and who eventually begin a training program while incarcerated, will qualify for services.

A registrant who is a DOC/CDP registrant is identified on the Title 3 Wagner Peyser Program Registration page, as indicated below:



This is where the case manager staff records the status of their customer at registration. Individuals who are provided services through the DOC/CDP Project will have a Yes response to the radio button on this page.

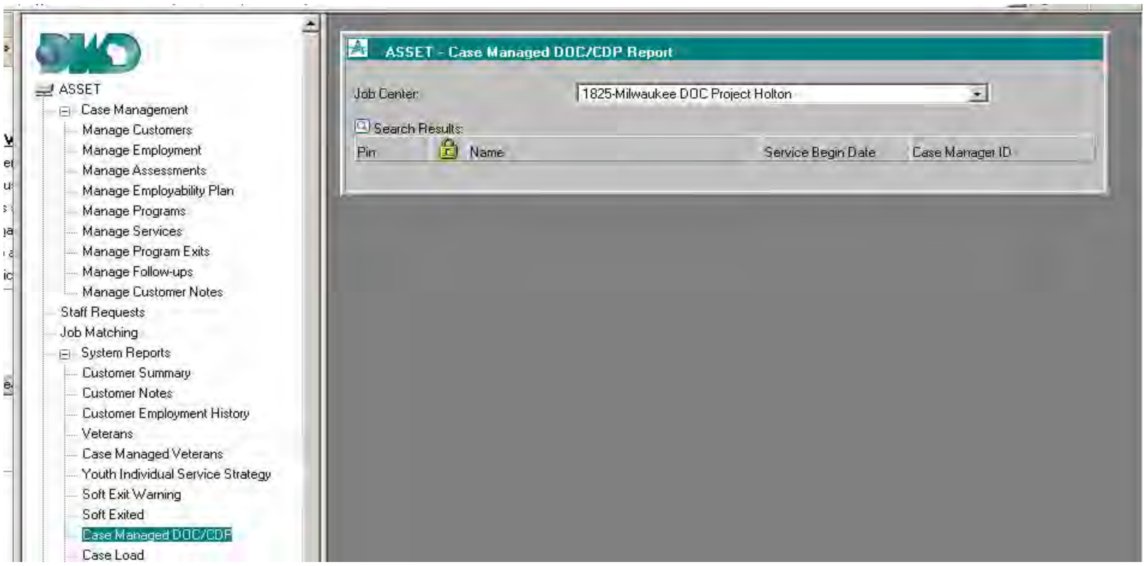
To access this report, open the System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next click on the Case Managed DOC/CDP Report option.

Users' Guide

ASSET SYSTEM REPORTS

5-10 ____CASE MANAGED DOC/CDP____

A page will display that looks like this:



From the drop down Job Center field, select the appropriate Job Center to display the desired report. A report then appears that lists the Search Results. Included on this report is the Customer PIN, the Customer Name, (last name, first name), the Service Begin Date, and the Case Manager name.

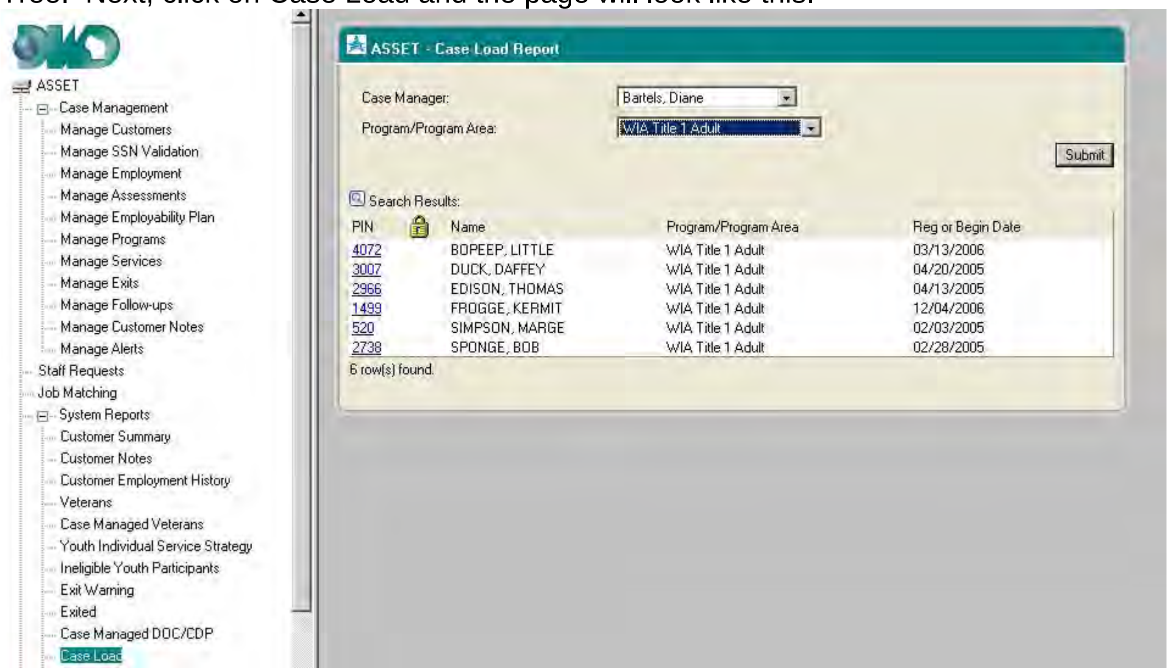
[Return to Index-Click Here]

ASSET Users' Guide

ASSET SYSTEMS REPORT

5-11 _____CASE LOAD REPORT_____

The **Case Load Report** was developed as a Case Management tool for ASSET users. To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on Case Load and the page will look like this.



The case load report defaults to the Case Manager logged into ASSET. To obtain a report for another case manager select the name from the drop down Case Manager field. Next, select the Program/Program Area to see the number of individuals on the Case Load.

The Search Results provides information about the participants by the Program/Program Area selected by the case manager. Included on the report are; PIN, Name (customer name), Program/Program Area, and the Registration or Begin Date.

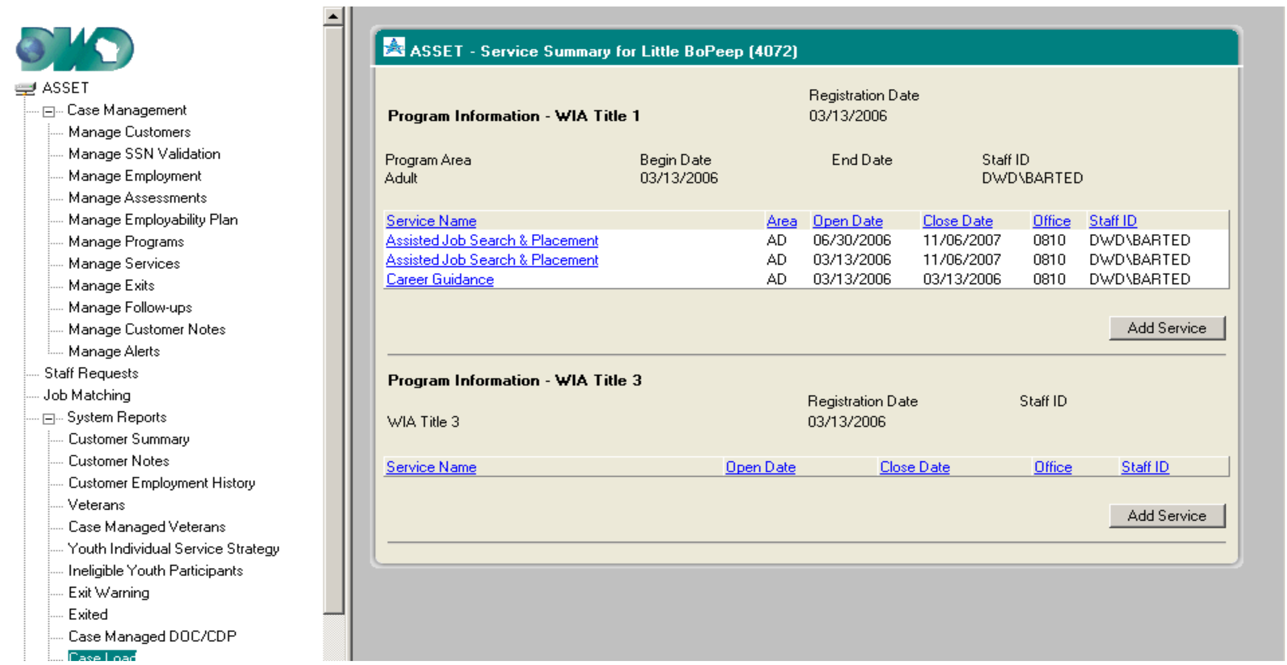
The Field Descriptions are:

FIELD	REQUIRED	DESCRIPTION
• **Case Manager**	N/A	The name of the Case Manager for this report.
• **Program/Program Area**	N/A	The Program Area from which the individual is receiving services.

ASSET SYSTEMS REPORT

5-11 _____CASE LOAD REPORT_____

By clicking on the PIN (underlined and highlighted in blue), the page returned is the Service Summary Page. It will look like this:

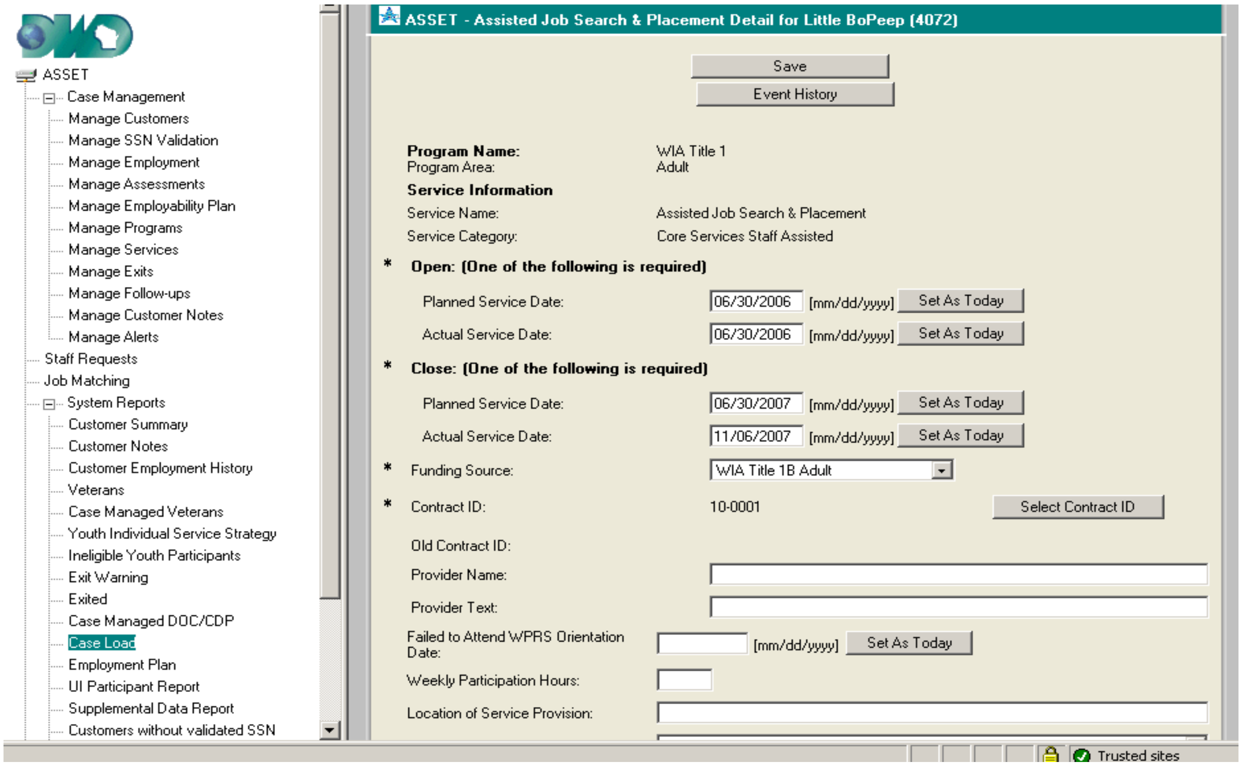


Click on the Service Name highlighted and underlined in blue. This action will take you to the Service Summary page where a case manager can either update/change the service.

Users’ Guide

ASSET SYSTEMS REPORT

5-11 _____CASE LOAD REPORT_____



Once a participant has been system exited the individual will drop off the Case Load listing.

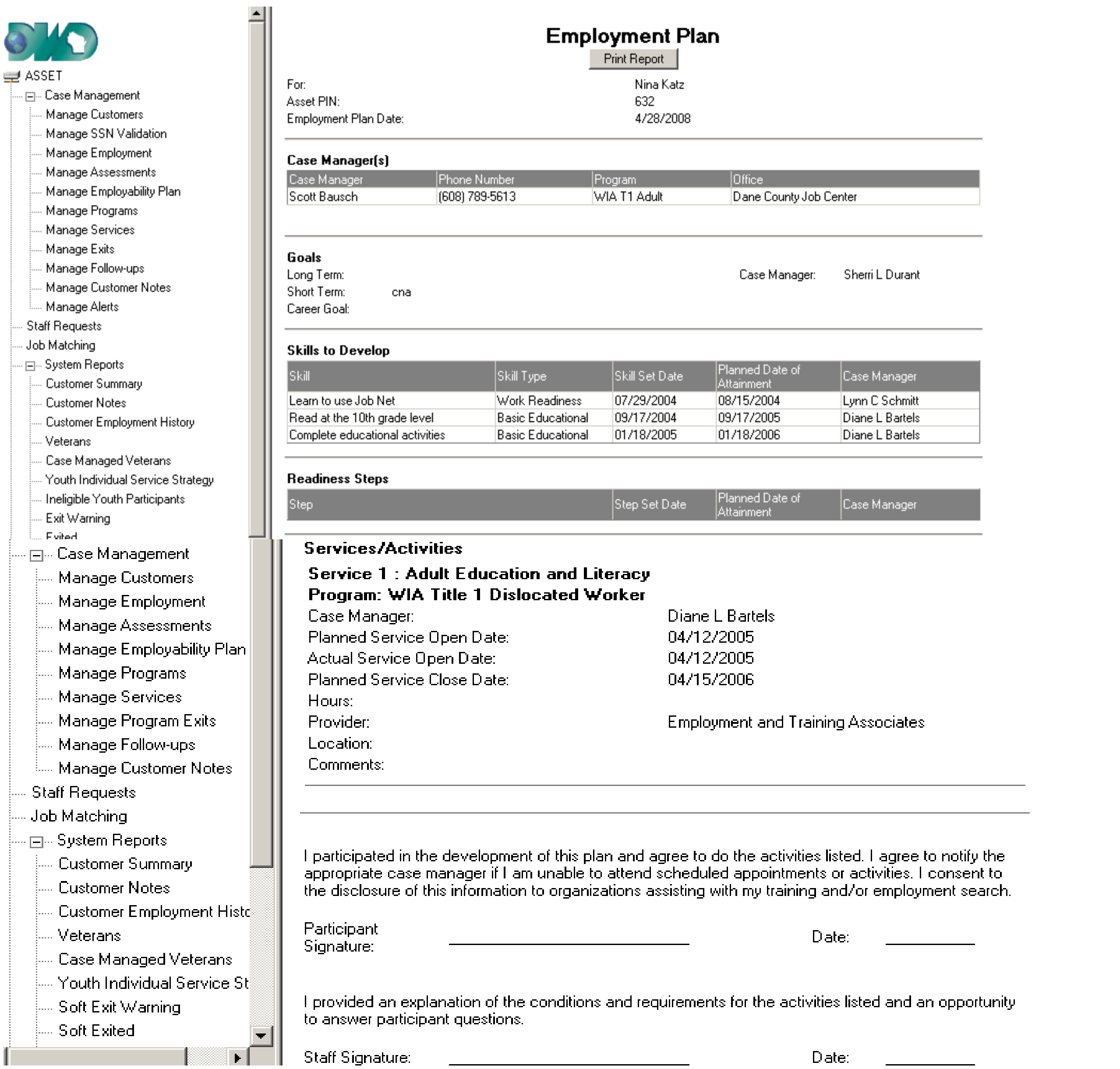
[Return to Index-Click Here]

USER'S GUIDE

ASSET SYSTEMS REPORT

5-12 _____EMPLOYMENT PLAN_____

The **Employment Plan Report** is located under the System Reports section of ASSET. To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu. Next click on Employment plan and the page returned will look like this.



Employment Plan

Print Report

For: Nina Katz
Asset PIN: 632
Employment Plan Date: 4/28/2008

Case Manager(s)

Case Manager	Phone Number	Program	Office
Scott Bausch	(608) 789-5613	WIA T1 Adult	Dane County Job Center

Goals

Long Term: Case Manager: Sherri L Durant
Short Term: cna
Career Goal:

Skills to Develop

Skill	Skill Type	Skill Set Date	Planned Date of Attainment	Case Manager
Learn to use Job Net	Work Readiness	07/29/2004	08/15/2004	Lynn C Schmitt
Read at the 10th grade level	Basic Educational	09/17/2004	09/17/2005	Diane L Bartels
Complete educational activities	Basic Educational	01/18/2005	01/18/2006	Diane L Bartels

Readiness Steps

Step	Step Set Date	Planned Date of Attainment	Case Manager

Services/Activities

Service 1 : Adult Education and Literacy
Program: WIA Title 1 Dislocated Worker

Case Manager: Diane L Bartels
Planned Service Open Date: 04/12/2005
Actual Service Open Date: 04/12/2005
Planned Service Close Date: 04/15/2006
Hours:
Provider: Employment and Training Associates
Location:
Comments:

I participated in the development of this plan and agree to do the activities listed. I agree to notify the appropriate case manager if I am unable to attend scheduled appointments or activities. I consent to the disclosure of this information to organizations assisting with my training and/or employment search.

Participant Signature: ______________________ Date: ________

I provided an explanation of the conditions and requirements for the activities listed and an opportunity to answer participant questions.

Staff Signature: ______________________ Date: ________

The data captured on this report comes from specific areas within Manage Assessments (Goals), Manage Employability Plan (Skills to Develop, Job Readiness Steps), and Manage Services (Services/Activities).

5-12 _____EMPLOYMENT PLAN_____

The ICON on the Manage Assessment page indicates that the responses will populate to the Employment Plan. At least one **Goal** must be listed to create the Employment Plan.

Pulling the information from these three areas in ASSET dynamically creates the Employment Plan. Worker's can use this report to enter into a contract with their customer. The Employment Plan can be printed and includes a block for signatures of both the customer and the case manager. Each should retain a copy of the signed plan for reference.

The Employment Plan is intended to be for the customer, and as such should be updated as needed. In most instances, an Employment Plan should be reviewed with the customer on a regular basis, to determine the progress and to add or change the Goals, Skills to Develop, and/or Job Readiness Steps as appropriate. The appearance of the Employment Plan will change each time a change is made in ASSET to any of the areas that are drawn together to create the Employment Plan.

From a monitoring and program operation standpoint, the printed and signed version of the Employment Plan will be the one that is in effect for the customer.

Return to Index-Click Here

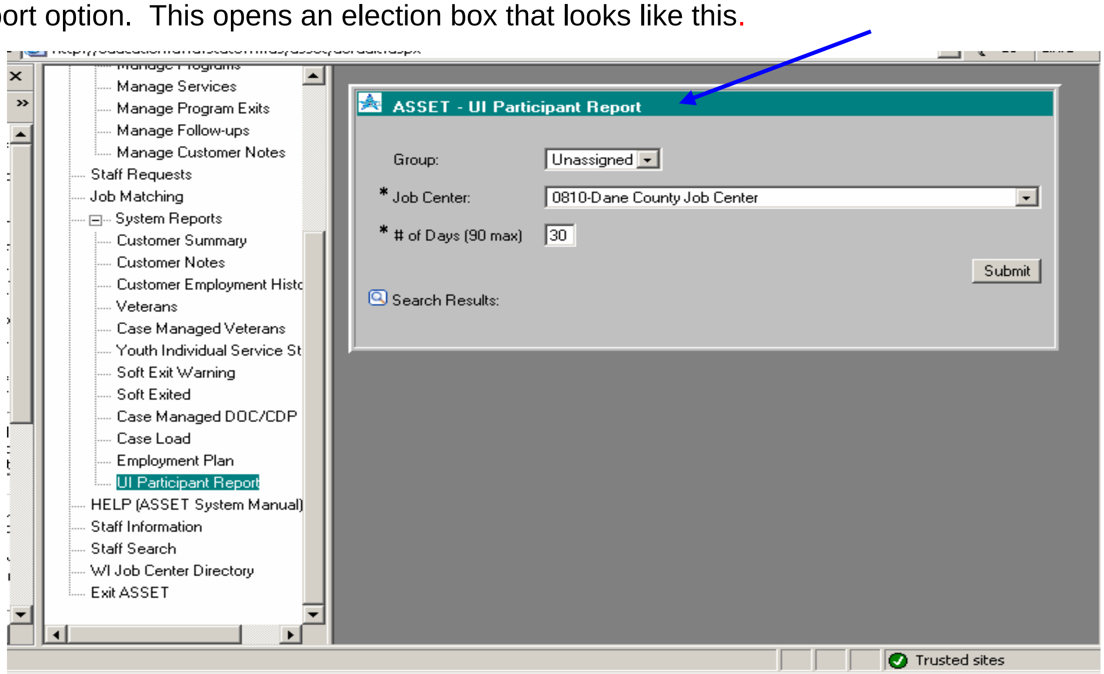
ASSET USERS' GUIDE

ASSET SYSTEMS REPORT

5-13 ____UI PARTICIPANT REPORT_____

The UI Participant Report provides project staff (currently only for the DOL Demonstration Grant sites in Oshkosh and Milwaukee) a listing of the individuals who have been referred by UI to ASSET. It is important for all ASSET Users to note that individuals who have been referred to ASSET by UI automatically will have a Manage Customer record created by the UI Benefit system information provided on the initial UI Claim.

The UI Participant Report is created upon request. To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on the UI Participant Report option. This opens an election box that looks like this.



The Field Definitions are:

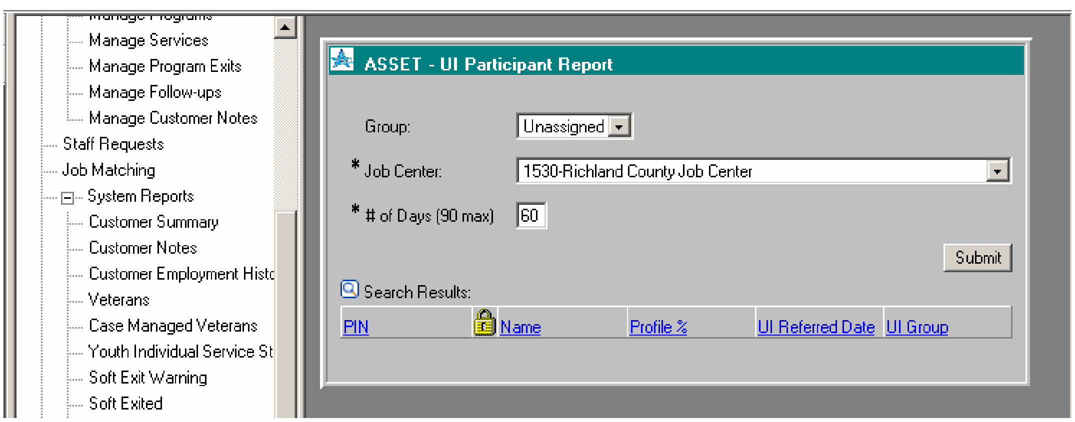
FIELD	DESCRIPTION
• **Group:**	The following are the Group Items to select from: • Unassigned • Assigned • All
• **Job Center:**	Select from the dropdown the Job Center for which the listing is being requested.
• **# of Days:**	Select the number of days to conduct the search by.

ASSET SYSTEMS REPORT

5-13 ____UI PARTICIPANT REPORT_____

When a worker clicks on the Submit button the Search Results appear. Data captured on the report is:

- the PIN of the customer (Personal Identification Number),
- the Customer Name (as it appears in their UI benefits claim record),
- the Profile percentile assigned by UI (claimant's likelihood of exhausting UI benefits),
- the UI Referred Date (which is always a Saturday), and
- the UI Group information (all will start with "N" – staff must enter a Group Assignment Code (once it has been determined). Codes include:
  - A – Group "A" Assignment
  - B – Group "B" Assignment
  - S – Similar Service Exempt
  - E – Employed
  - N – No-Show



Note that the UI Referral Date and Profile percent are display only.

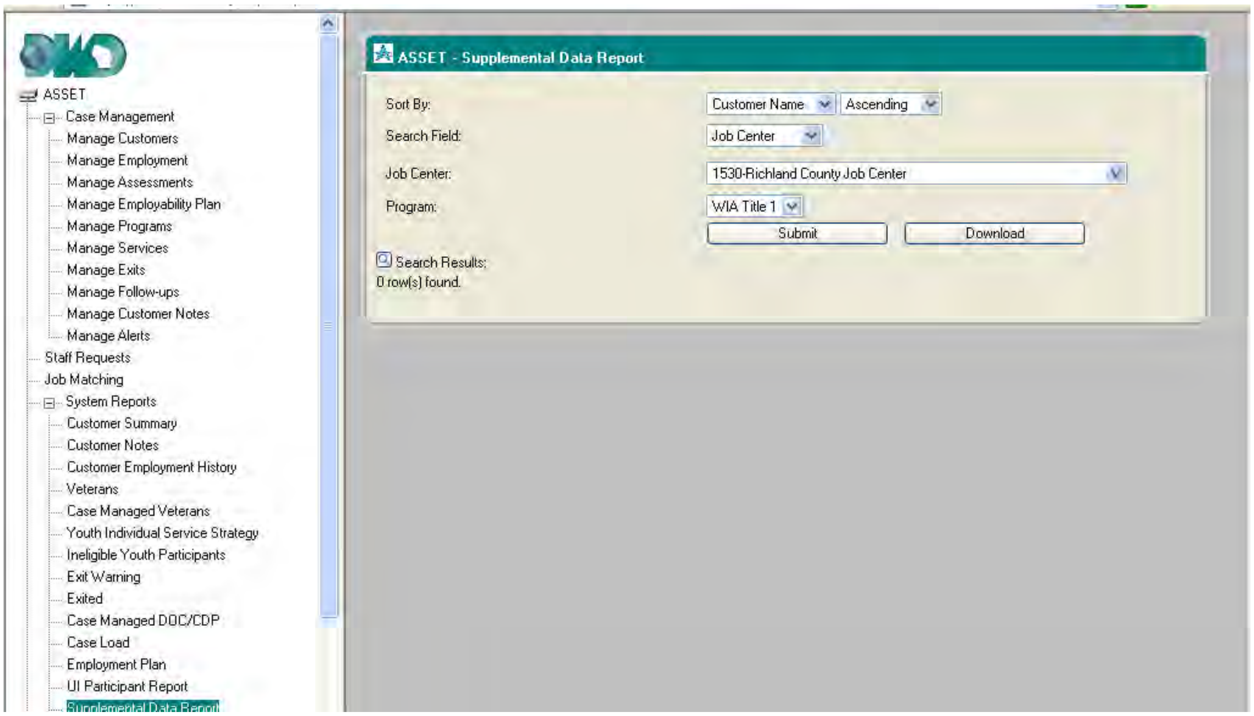
[**Return to Index-Click Here**]

Users' Guide

ASSET SYSTEM REPORTS

5-14 ____SUPPLEMENTAL DATA REPORT____

The **Supplemental Data Report** is located under the System Reports section in ASSET. To access the report, open System Reports by clicking on the plus sign (+) on the ASSET Menu. Next, click on Supplemental Data Report. The page returned will look like this.



This report has the usual search functionality. Staff can sort the report by Customer Name, PIN, Exit Date or After Exit quarter. The sort is available in either Ascending or Descending order. The Job Center that should be used in the search is the Job Center listed on the Manage Programs page. This report is available for WIA Title I, WIA Title 3, and TAA Programs.

When responses have been selected for all the fields, staff has two options to choose from. The Submit button creates a report of individuals who need to have supplemental employment data entered into the appropriate Follow-Up Status quarter screens in ASSET.

This report notifies staff when employment information has not been found through the UI Wage Record cross match. . The report selects those individuals that have a value of "Necessary" in the Supplemental Data Status field and a value of "null" or "not verified" in the Supplemental Data Verification Status field on any of their Follow-Up Status quarter tabs.

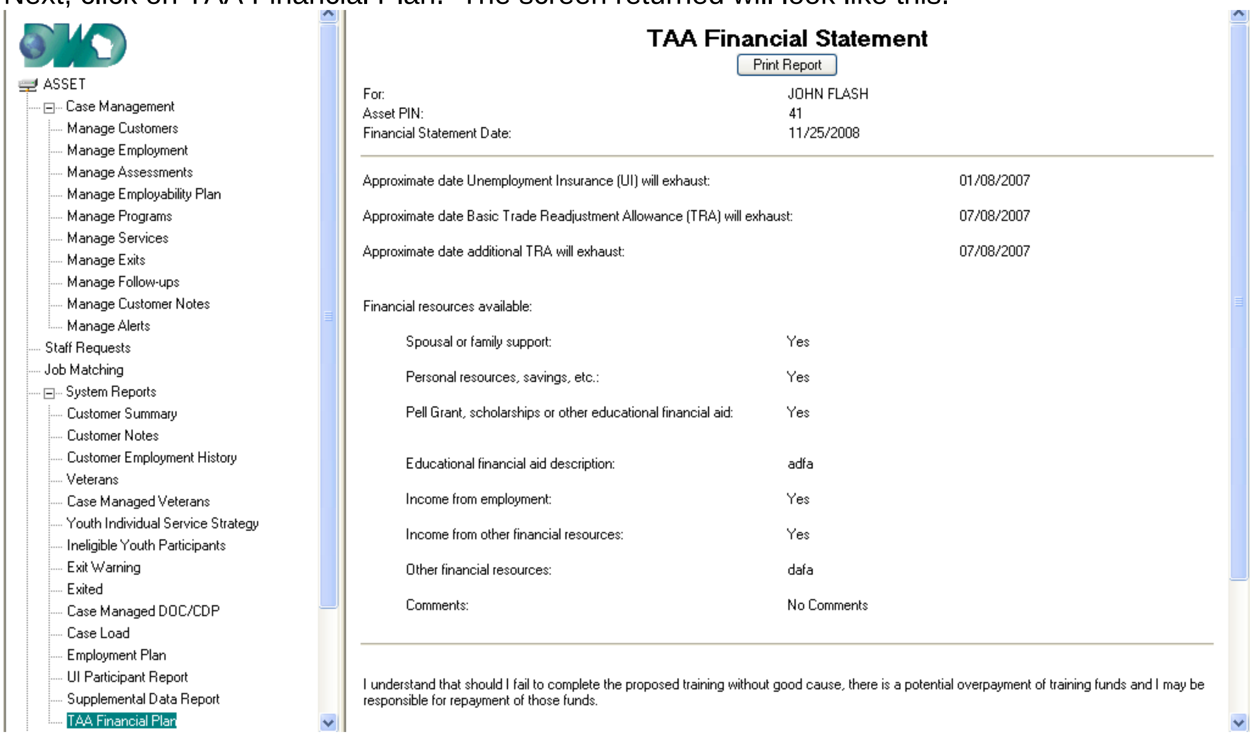
Return to Index – Click Here

Users' Guide

ASSET SYSTEMS REPORT

5-15 ____TAA FINANCIAL PLAN ____

The **TAA Financial Plan** is located under the Systems Report section of the ASSET Menu. To access the plan, open System Reports by clicking on the (+) sign on the ASSET Menu Tree. Next, click on TAA Financial Plan. The screen returned will look like this.



The data captured on the report comes from specific areas of the TAA Financial tab located on the TAA Program Registration screen in ASSET. The information from this tab in ASSET dynamically creates the TAA Financial Plan.

The TAA Financial Plan can be printed and includes an area for signature and date for both the Participant and Staff. Each should retain a copy of the signed plan for reference.

The TAA Financial Plan is intended to be for the participant, and as such should be updated as needed. In most instances, a TAA Financial Plan should be reviewed with the customer on a regular basis to determine the progress and to add or change information as appropriate. The appearance of the TAA Financial Plan will change each time a change is made and saved in ASSET to any of the areas that are used to create the TAA Financial Plan.

From a monitoring and program operation standpoint, the printed and signed version of the TAA Financial Plan will be the one that is in effect for the customer.

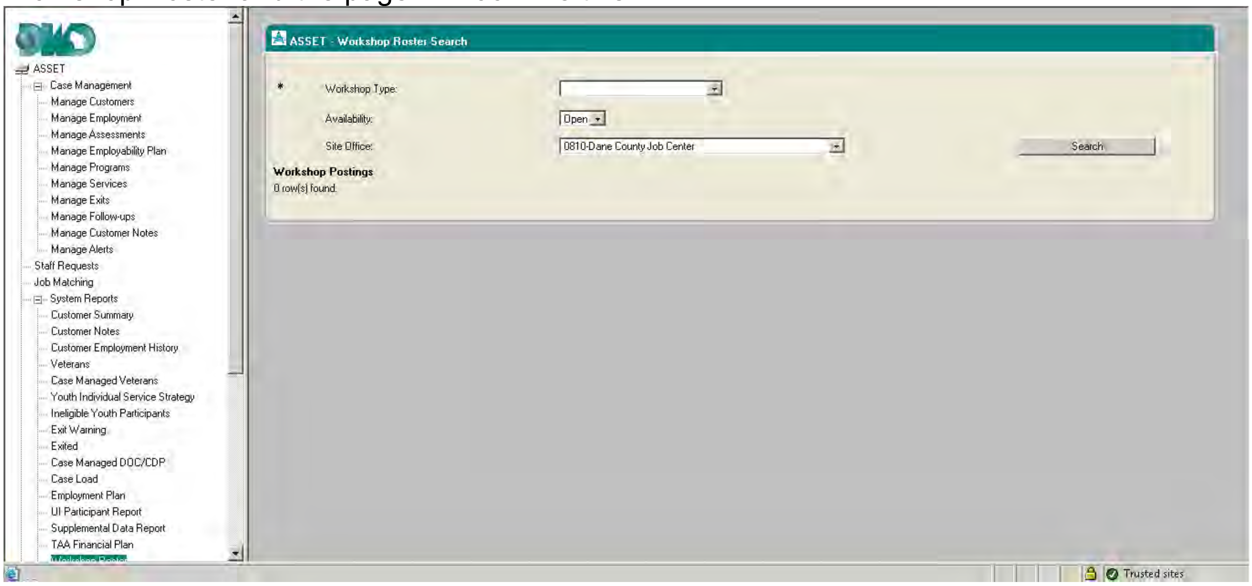
Return to Index click here

Users' Guide

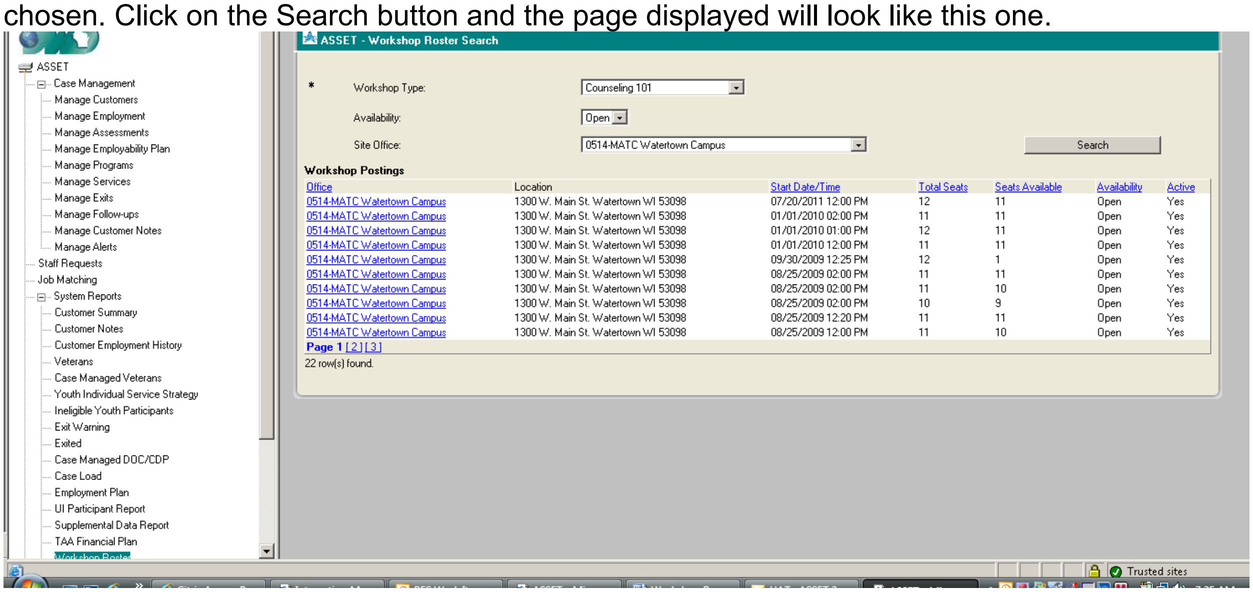
ASSET SYSTEMS REPORT

5-16 _____WORKSHOP ROSTER REPORT_____

The **Workshop Roster** was developed as a tool for a case manager to locate a potential workshop in their area or an area within a customer's accessibility. To access the report, open Workshop Reports by clicking on the plus sign (+) on the ASSET Menu Tree. Next, click on Workshop Roster and the page will look like this.



The Workshop report defaults to the Case Manager logged into ASSET. Next, select the criteria of Workshop Type, Availability and Site office to locate Workshop information for the criteria chosen. Click on the Search button and the page displayed will look like this one.



Users' Guide

ASSET SYSTEMS REPORT

5-16 _____WORKSHOP ROSTER REPORT_____

The Search Results provides information about the Workshops by Office Site, Location, Start Date/Time, Total Seats, Seats Available, Availability, and whether the status of the workshop. Included on the report are; PIN, Name (customer name), Program/Program Area, and the Registration or Begin Date.

The Field Descriptions are:

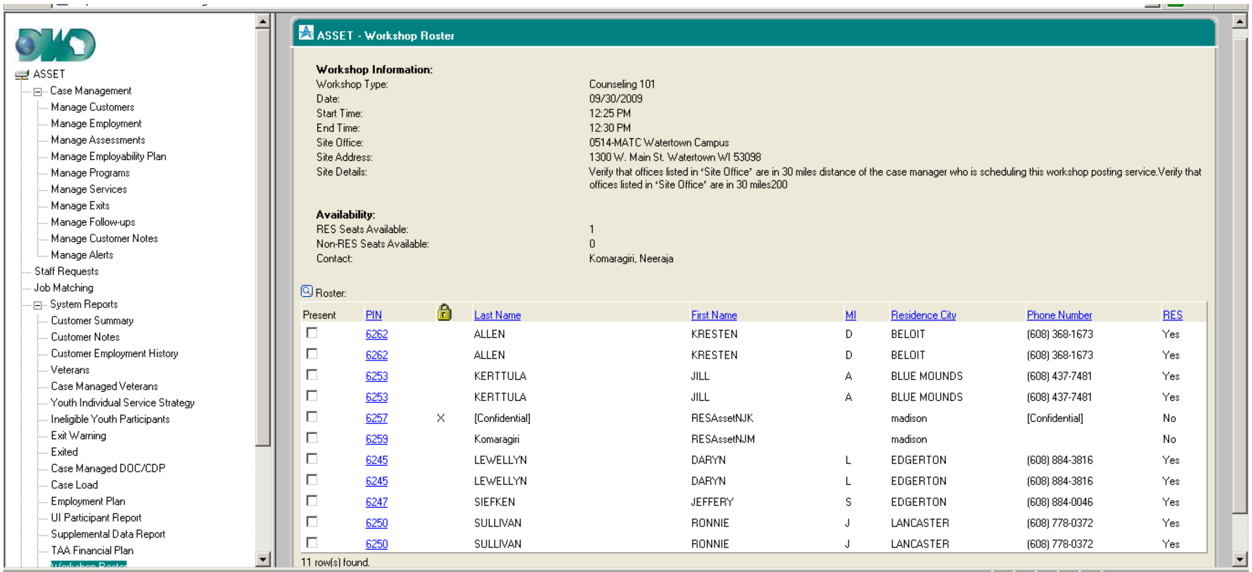
FIELD	REQUIRED	DESCRIPTION
• **Office Site**	N/A	Office Number and Site Name
• **Location**	N/A	Address of Workshop
• **Start Date/Time**		Date and Time of Workshop
• **Total Seats**		Number of Attendees
• **Seats Available**		Number of Seats Available for scheduling
• **Availability**		Options include: • All • Open • Full
• **Active**		Status of Workshop Active/Inactive

By clicking on the Office Site (underlined and highlighted in blue), the page returned is the Workshop Roster. It will look like the one below when customers are scheduled.

Users' Guide

ASSET SYSTEMS REPORT

5-16 _____WORKSHOP ROSTER REPORT_____

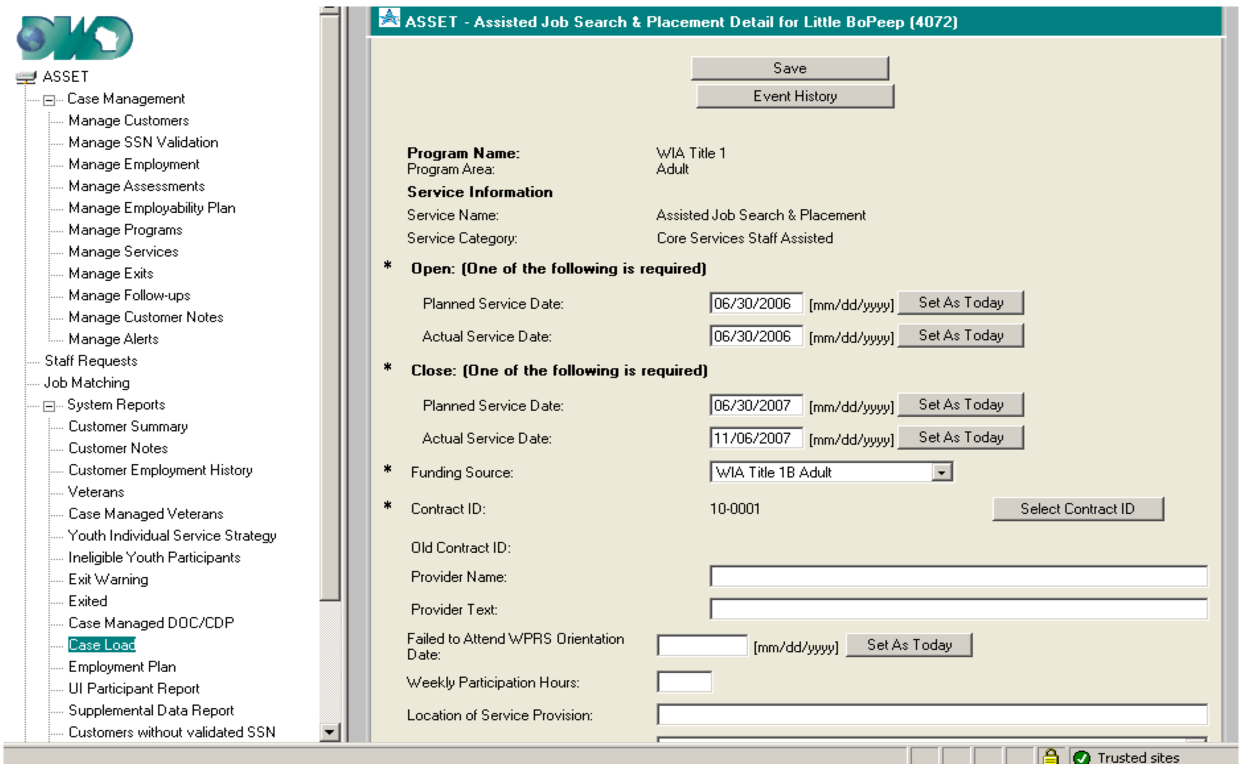


Click on the PIN highlighted and underlined in blue takes staff to the Workshop Details page. RES Staff can update the customer's information on this page. For example, if the customer doesn't attend the workshop they can remove the workshop or update it.

Users' Guide

ASSET SYSTEMS REPORT

5-16 _____WORKSHOP ROSTER REPORT_____



Once a participant has been system exited the individual will drop off the Roster listing.

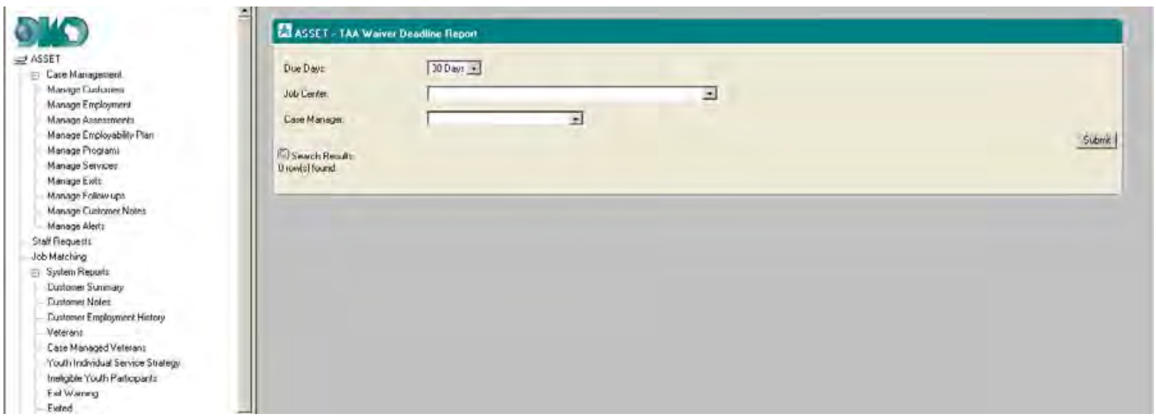
Return to Index-Click Here

USER'S GUIDE

ASSET SYSTEM REPORTS

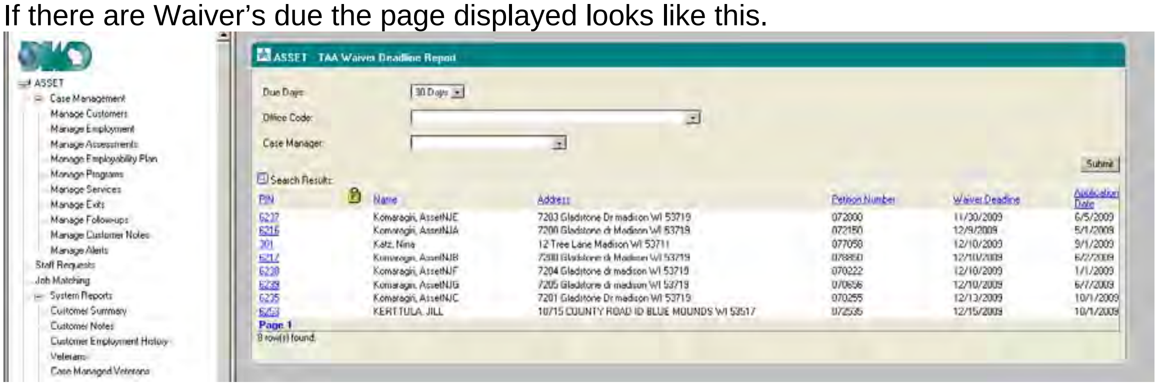
5-17 ____ TAA WAIVER DEADLINE REPORT____

The **TAA Waiver Deadline Report** was created as a tool for TAA staff to view a listing of customer's with a Waiver Deadline.   To access the report, open Systems Report by clicking on the plus sign (+) from the ASSET menu. Next, click on the TAA Waiver Deadline Report. The page returned looks like this.



To obtain data for the report begin by selecting either 30 or 60 days from the Due Days drop down field to begin your Search. Next select the Job Center and Case Manager as additional criteria (filter) for the appropriate area and staff and click the Submit button.

If there are Waiver's due the page displayed looks like this.



The Search Results returned has the following columns and information

- PIN=Customer ID
- Name= Name of Customer,
- Address= Residence of Customer,
- Petition Number=Taken from Program Registration
- Waiver Deadline-Due Date
- Application Date= TAA Application Date

USER'S GUIDE

ASSET SYSTEM REPORTS

5-17 ____ TAA WAIVER DEADLINE REPORT____

The report data is calculated for each of the Due Days with the following requirements:
-Displays TAA participants with petition #s that is => 70000 and meets the following conditions:

Current requirements:

1.) Do not have an actual start date of a Training Service
2.) Do no have a "Training Waiver Review Service."
3.) Current date is within 30 days of waiver deadline (Certification date plus 26 weeks Or Most Recent Date of Separation plus 26 weeks which is the later).

Previous Requirements:

-Displays TAA participant with Petition numbers that are < than 70000 and meet the following conditions:

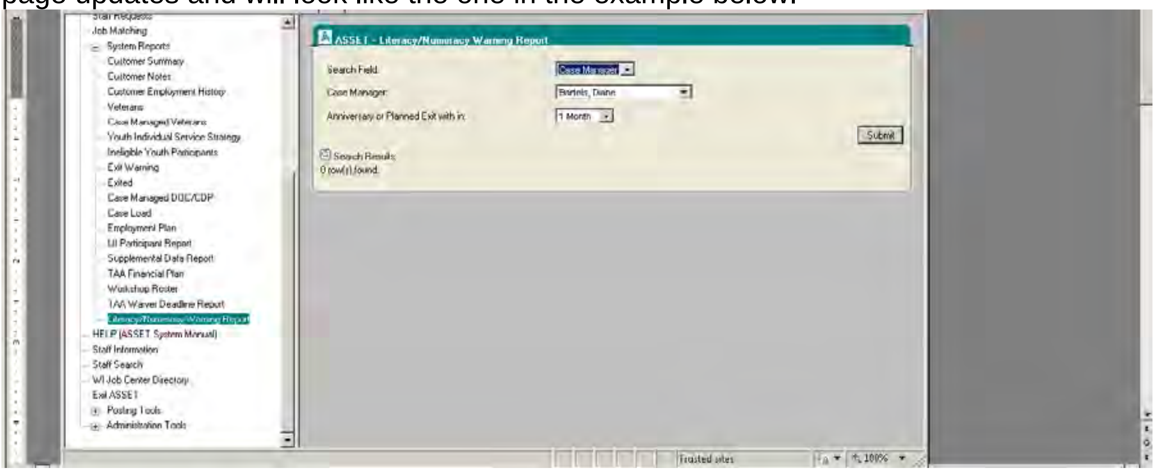
1.) Do not have an actual start date
2.) Do not have a "Training Waiver Review" service
3.) Current Date is within 30 days of waiver deadline (Certification date plus 8 weeks Or Most Recent Date of Separation plus 16 weeks, whichever is the latter.

To verify the Waiver Deadline Date, click on the PIN. This will re-direct staff to the General Program Summary page for TAA in ASSET. The date you will need to verify is located on the TAA tab, and will be either the Date of Determination or Most Recent Qualifying Separation Date.

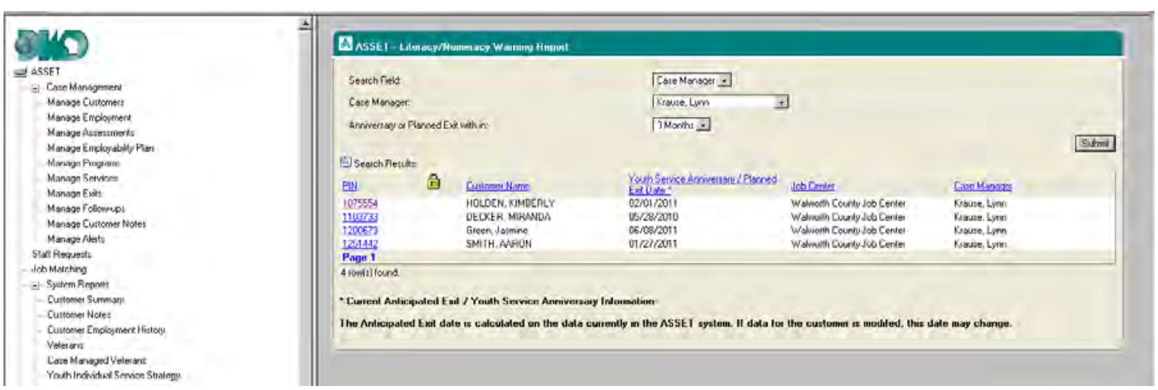
Return to Index

5-18 ______LITERACY/NUMERACY WARNING REPORT_______

The **Literacy/Numeracy Warning Report** can be accessed by clicking on the (+) sign under System Reports, on the ASSET Menu tree. Click on the plus sign and the menu expands. Next, click on the menu item called Literacy/Numeracy Warning Report. The page updates and will look like the one in the example below.



Staff can conduct searches by WDA, Job Center, or Case Manager, by selecting the time frame of 1, 2, 3, or 6 months, which is prior to the applicable anniversary of the Date of First Youth Service, or the Planned Exit Date, whichever is first. Select the appropriate criteria, and then click on the Submit button.



Individuals that appear on the list are those included in the measure, and who don't have Pre-Tests for both Reading and Mathematics and/or they do not have a Post-Test in the applicable Post-Test Year that has an increase in at least one EFL in either Reading or Mathematics.

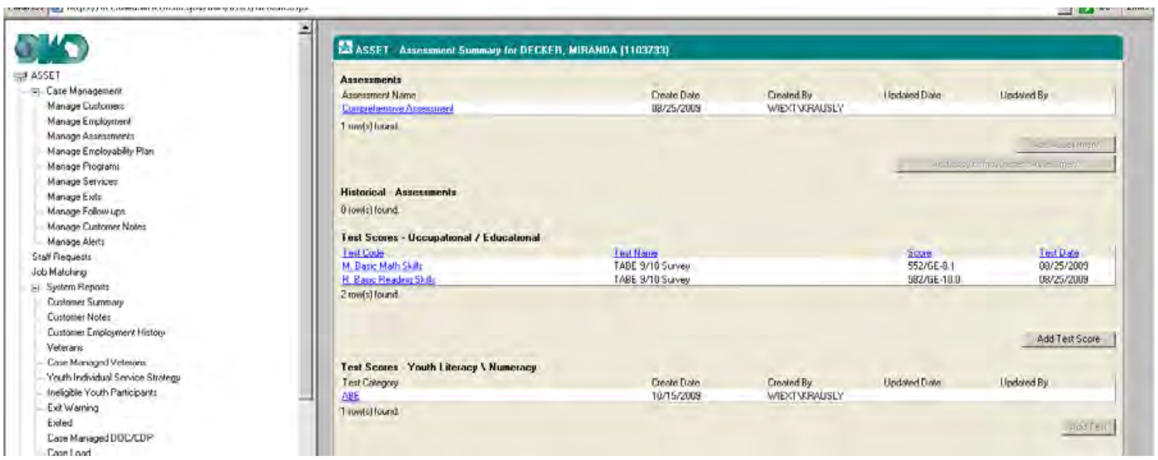
The Search Results include:

PIN	Customer Name	Youth Service Anniversary/Planned Exit Date	Job Center	Case Manager

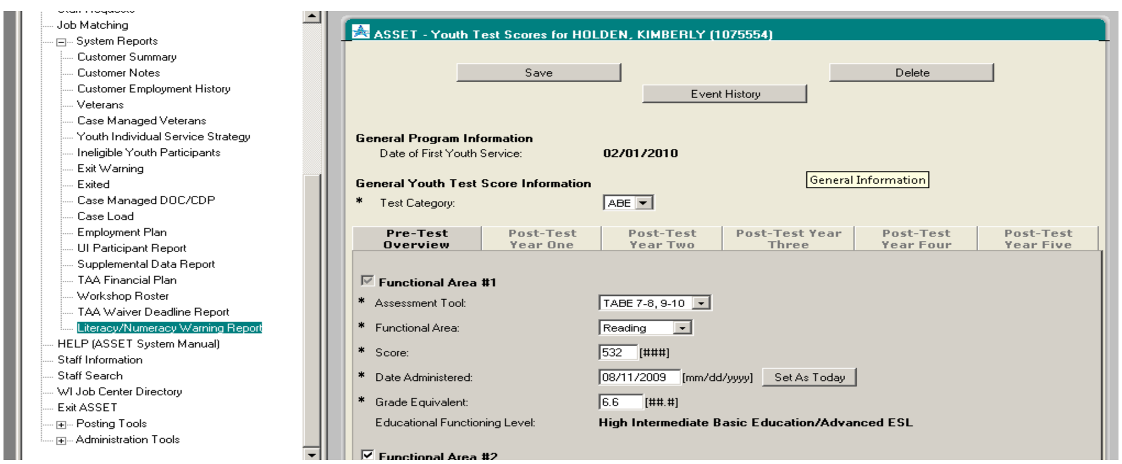
5-18 _____LITERACY/NUMERACY WARNING REPORT________

ASSET Identifier	Participant ID	Located on Manage Exits	Area where services are provided	Staff who are case managing the participant

Workers have the option of clicking on the PIN (highlighted and underlined in blue) for any individual shown on the list to go directly to that person's Assessment Summary page in ASSET. It looks like this:



Staff should click on the Test Category Link, located under the Test Scores- Literacy/Numeracy to access the participant Youth Test Score page to make updates.



Staff should periodically run this report as it updates daily.

Return to Index

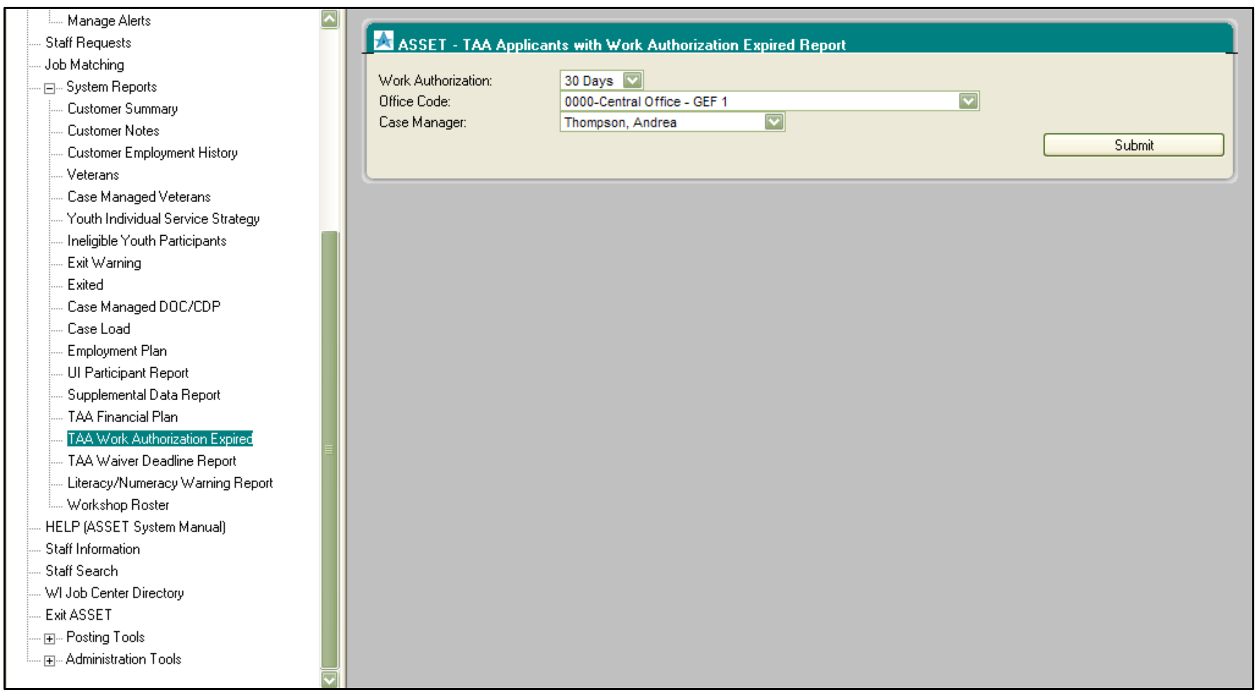
ASSET Users' Guide

ASSET SYSTEMS REPORT

5-19 ____TAA WORK AUTHORIZATION EXPIRED____

The **TAA Work Authorization Expired** report provides TAA staff the ability to view a list of customers who are not U.S. citizens, have an open TAA service and who are either no longer eligible to work or will become ineligible to work within a selected timeframe.

The report is accessed under the System Reports left navigation menu in ASSET. Click on the plus (+) sign next to System Reports. Then click on TAA Work Authorization Expired.



.

To generate a report with data first select the work authorization status, either 30, 60 or 90 days until expiration, expiration past due, or no expiration date. Next, select the Office Code and Case Manager as additional search criteria and click the Submit button.

ASSET SYSTEMS REPORT

5-19 ____TAA WORK AUTHORIZATION EXPIRED____

FIELD DEFINITIONS

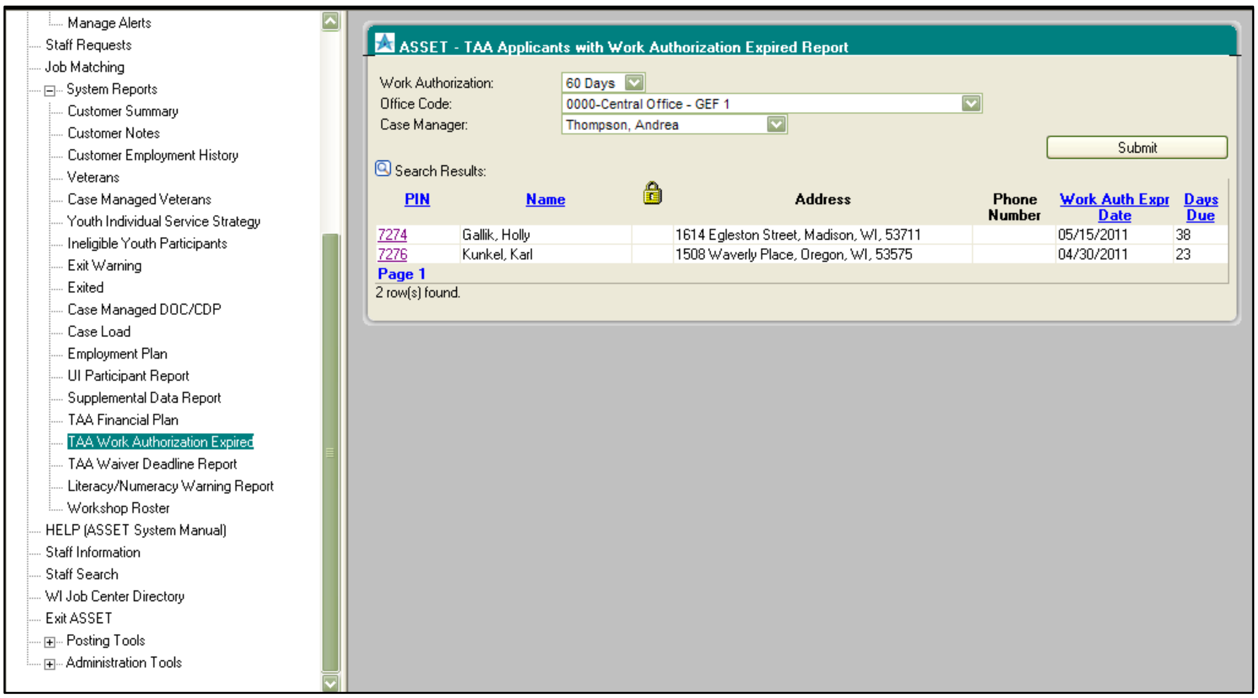
FIELD	FIELD DEFINTIONS
• **Work Authorization**	The work authorization status: • 30 Days (until the expiration date) • 60 Days (until the expiration date) • 90 Days (until the expiration date) • Past Due (date has already expired) • No Date
• **Office Code**	The TAA program office code.
• **Case Manager**	The TAA program case manager.

Users' Guide

ASSET SYSTEMS REPORT

5-19 ____TAA WORK AUTHORIZATION EXPIRED____

If there are customers who meet the search criteria selected (i.e. whose work authorization has already expired or will expire within the selected time frame based on the office code and case manager selected), a list of those customers will display.



The Search Results include the following columns and information:

- PIN = Customer ID
- Name = Customer Name
- Address = Customer's Address of Residence
- Phone Number = Customer's Phone Number, if provided
- Work Authorization Expiration Date = Date on which the Work Authorization expired or will expire, if applicable
- Days Due = Number of Days remaining until the work authorization expires, if applicable

Users’ Guide

ASSET SYSTEMS REPORT

5-19 ____TAA WORK AUTHORIZATION EXPIRED____

In order for a customer to display on the report, the customer must:

- Have an open episode (i.e. have no exit date).
- Have a TAA registration.
- Not be a U.S. Citizen and (one of the following):
    - Not legally authorized to work
    - Legally authorized to work, but has an expired work authorization date or a work authorization date that will expire in the amount of time specified in the search criteria (30, 60 or 90 days).

If an Office Code is specified as a search criterion, the selection must match the TAA program office code. If a Case Manager is specified as a search criterion, the selection must match the TAA program case manager.

“Past Due” should selected as the work authorization status when conducting a search if case managers wish to find those customers whose work authorization expiration date has already passed. Case managers can select “No Date” to include any customers for whom no work authorization expiration date has been specified.

To verify the Work Authorization Expiration status, click on the PIN for the desired customer in the search results list. This will access the General Program Summary page for TAA in ASSET. The Work Authorization Expiration Date is located at the bottom of the TAA tab.

Return to Index – Click here