

ASSET Technical Bulletin

ASSET Changes – Deployed on April 18, 2023

Temporary Customer Case Assignment Extended

- When staff take temporary case assignment for a customer, that assignment will now remain for 72 hours instead of 24 hours (excluding Saturdays and Sundays):

The screenshot displays the ASSET system interface. On the left is a navigation menu with options like Customer, Case Team, Documents, Job Seeker, Employment, Assessments, Employability Plan, Programs, Services, Exits, Follow-ups, Customer Notes, Job Matching, Customer Reports, Financials, and CEPT. The main content area shows 'Customer Details' for a customer with PIN 32246. A 'Case Team Status' message states: 'You are not currently assigned to the Case Team for this customer. Case Team is a recorded event, as is any Case Team member assigned to the customer.' Below this is a 'Contact Information' section with fields for Intake Date (01/18/2023), Reason for Pseudo SSN (JCW registrant declined to provide SSN), Title, and First Name (JCWJSREIGHT). An 'ASSET - Assignment Acknowledgement' modal is open, showing a table with columns: Staff, Purpose, Start Date, and End Date. The table contains one row: Staff: Kulkarni, Deepa; Purpose: Career Planning; Start Date: 1/19/2023; End Date: 1/23/2023. Below the table is an 'Acknowledgement' text block and a 'Join Case Team' button.

Staff	Purpose	Start Date	End Date
Kulkarni, Deepa	Career Planning	1/19/2023	1/23/2023

This screenshot shows the same ASSET system interface as the previous one, but with the 'End Date' in the 'ASSET - Assignment Acknowledgement' modal extended to 1/24/2023. The 'Join Case Team' button is still present. The background 'Customer Details' section remains the same, showing the customer's contact information and case team status.

Staff	Purpose	Start Date	End Date
Kulkarni, Deepa	Career Planning	1/20/2023	1/24/2023

Customer Search Improvements:

- Staff can now sort the Customer search results by the DOB column:

acc.dwd.wisconsin.gov/det/assetiteration/presentation/CustomerSearch.aspx?CRYPT=T&TWVudVNiOGVjdGlvbj1NQUSBR0VDVNVUT01FUIM=

Field: Operator: Criteria:

Search >>

Previously Searched Assigned Customers:

Last Name	First Name	MI	City	DOB	Assignment	PIN
TAA	Out of State		Anytown	01/01/1959	★	7892
H1b	Dee		Madison	01/01/1970	★	26013
WAI	Joe		Madison	09/24/1981	★	31966
aabye	bbbllzzz		madison	07/09/1989	★	11355
a	aw		Non-US City	01/01/1990	★	1799
kulk	JCWJSRSIX		Madison	01/01/1990	★	31526
KULK	JCWJSRONE		Madison	01/01/1990	★	31186
KULK	CUST1		Madison	01/01/1990	★	31166
Youth	Rita		La Crosse	01/01/1995	★	11142
Mamukutty	Vijay		ANCHORAGE	11/11/2000	★	21290

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13 row(s) found.

- PIN fields in the multi-search services and multi-search notes grids are now linked to the customer record, on click will navigate to take the case assignments:

Customer Multi Search - Services

* Career Planner: Program/Program Area:

Get List

Select All (50 max)

Clear All **Add Service to Selected Customers**

Search Results:

Please join the case team to select customers

	PIN	Assignment	Name	Intake Date	Reg or Begin Date
<input type="checkbox"/>	24553		BLOBBERSON, BOB	06/01/2021	11/10/2021
<input type="checkbox"/>	26633		BUCKYINGHAM, TEST	11/18/2021	12/30/2021
<input type="checkbox"/>	25172		DARTON, POLLY	08/05/2018	06/20/2022

Customer Notes Improvements

- 'Comments' field on Customer Notes detail screen has been increased to 2000 characters:

Customer Note Details

Save

Delete

Event History

Customer Note Information:

Note ID:

Not Yet Assigned

*

Note Date:

[mm/dd/yyyy]

Set As Today

*

Summary:

Comments:

caution 2000 character limit

- Staff now can add notes to multiple customers who they have case assignments for without regard to the program:

Customer Multi Search - Notes

Customer Multi Search - Notes

* Career Planner:

Scales, Alison

Program/Program Area:

Title 1 Adult

Program Status:

Open

Exited

Get List

Select All

(50 max)

Clear All

Add Note to Selected Customers

Search Results:

	PIN	Assignment	Name	Intake Date	Reg or Begin Date	Exit Date
<input type="checkbox"/>	19530	★	HEATHER TEST, TITLE 3	11/29/2019	04/05/2023	
<input type="checkbox"/>	33307	★	SATU, ALISON	02/23/2023	03/07/2023	

JCW Service Fix:

- Staff name will not appear for JCW online self-services. 'Staff ID' is not populated if the Service Name is "Online Self Services" and if the service is JCW-generated:

Service Summary

Registration Date: 01/18/2023

Program Information - Title 3

Service Name	Fund	Open Date	Close Date	Office	Staff ID
Online Self-Services and Informational Activities	JCW	01/19/2023	01/19/2023	0810	
Online Self-Services and Informational Activities	JCW	01/18/2023	01/18/2023	0810	ACCOUNTS\KULKADXSXU

Add Service

Fix to retain "Exhausting TANF" field entries

- Values chosen are now retained after save

Fix to resource links on JVSG program details tab

- Links have been corrected

Document Improvements:

- Staff can now see Document Type for confidential documents (except those that indicate PII):

Current Documents				
Document Type	Document Name	Uploaded/Modified Date	Uploaded/Modified By	Action
Baptismal Record	This is a confidential document.docx	3/14/2023 1:57:31 PM	ACCOUNTS\SCALEACYMJ	Details
Page 1				
1 document(s) found.				

- Added "Email" as document type under all categories in Documents:

Add Document

Upload Documents:

1. Only .doc, .docx, .xls, .xlsx, .gif, .jpg, .pdf and .png documents can be uploaded.
2. The file name cannot contain special characters (such as @, &, #).
3. Your documents will be scanned for viruses during the upload process. If a virus is found, your document will not be uploaded.

Select Category: Title 1

Select Document Type:

Confidential: ☐

Select Program:

Select Document to Upload: Choose File No file chosen

Email

- Employer Letter / Statement
- Employment Plan
- Federal / Local ID Card
- Foster Care Documentation
- Free / Reduced Lunch Documentation
- High Poverty Area Documentation
- Homeless Documentation
- Housing Authority Verification
- Individual or Small Group Layoff Documentation
- Layoff Notice
- Mileage Logs
- Needs Additional Assistance Documentation
- Non-State Issued Birth Record
- On-the-Job Training Contract
- Participant Attestation
- Participant Rights & Responsibilities
- Passport
- Paycheck Stubs
- Pension Statement

Document

- Added "Resume" as document type under the RESEA category in Documents:

Add Document

Upload Documents:

1. Only .doc, .docx, .xls, .xlsx, .gif, .jpg, .pdf and .png documents can be uploaded.
2. The file name cannot contain special characters (such as @, &, #).
3. Your documents will be scanned for viruses during the upload process. If a virus is found, your document will not be uploaded.

Select Category: RESEA

Select Document Type:

Confidential: ☐

Eligibility Review Questionnaire

Re-employment Services Session Notice

Release of Information

Resume

Work Search

Event History Improvements:

- Event History is now available on Employment Details page so that program audit can be done:

The screenshot shows the ASSET (Assessment and Support for Training) interface. The top navigation bar includes the State of Wisconsin DWD logo, the ASSET logo, and user information for JCWJSRONE KULK (31186). There are links for Customer Search, 7 Alerts, 0 Notifications, and Logout. The main navigation menu on the left lists various options: Home, Manage Customers, Staff, Admin Tool, System Reports, BI Reports, and Manage Financials. The left sidebar contains a list of links: Customer, Case Team, Documents, Job Seeker, Employment, Assessments, Employability Plan, Programs, Services, Exits, Follow-ups, Customer Notes, Job Matching, Customer Reports, and Financials. The main content area is titled "Employment Details" and includes buttons for Save, Delete, and Event History. Below these buttons is the "Employment History Information" section, which contains fields for Employment is for Incumbent Worker Program? (Yes, No, No Response), Employer Name (EmployerA_A), Employer Address Line 1 (201 E Washington ave), Employer Address Line 2, Employer City (Madison), Employer State (WI), and Employer Zip.

Title 1 Program Improvements

- An additional completion code was added to Occupational Classroom services to track segment completion:

The screenshot shows a form with a "Completion Code:" label and a dropdown menu. The dropdown menu is open, showing four options: "Will Never Start This Service", "Did Not Complete This Service", "Completed This Service", and "Completed Segment". The "Completed Segment" option is highlighted in blue. Below the dropdown menu is a label "ITA Established:".

- Staff can now add ITAs to in-school Youth participants (to comply with DOL waiver):

The screenshot shows the "Individual Training Account (ITA)" form. It includes a table with 0 rows found. At the bottom right, there is a "Program:" dropdown menu and an "Add ITA" button.

- Required parent info for <18 Youth participants at exit has been removed, in alignment with WIOA requirements:

Parent Guardian Info:

First Name:

Middle Initial:

Last Name:

Telephone: [(###) ### #####] Ext.

Street Address:

City:

State:

County:

Zip Code: - [##### #####]

RESEA Program Improvements

- Fixed links in RESEA Participant emails.
- Allowed Customer Support special access to edit and view an SSN on a customer record with RESEA activity
- Added "Evaluation Grouping" column and "Join Case team for all Registrants" button to the RES Session Planning Tool page:

Session Postings						
Date/Time	Session Type	Location	PIN	Customer Name	Customer Phone	Evaluation Grouping
02/18/2022 08:20 AM-08:50 AM	RESEA Initial Session	Re-employment Services Virtual Session, (This session will be held virtually)	26393	sumedi, cccathy	(608) 261-0709	
02/18/2022 12:20 PM-12:50 PM	RESEA Initial Session	Re-employment Services Virtual Session, (This session will be held virtually)	27476	summerville, cccathy	(608) 261-0709	RESEA Plus
02/21/2022 09:20 AM-09:50 AM	RESEA Subsequent Session	Re-employment Services Virtual Session, (This session will be held virtually)	27295	summerfield, cccathy	(608) 261-0709	RESEA Plus
Page 1						

3 rows found

Join Case team for all Registrants.

TAA Program Improvements

- An approved eligibility determination must be on file before staff is allowed to add any services (other than Eligibility Determination service):

Service Eligibility	
Program Information - TAA/NAFTA	
Participation-causing services may not be entered until Manage Programs screen is completed.	
Service Name	Service Description
Apprenticeship Training	Engaged in a registered apprenticeship program. The classroom portion of any registered apprenticeship program on the ETPL is ITA eligible. An OJT contract may be used to fund the on-the-job training portion of any registered apprenticeship program.
Case Management	Coordination of the multiple employment, educational, and supportive services necessary for a customer to obtain and retain employment
Comprehensive Individualized or Specialized Assessment	Additional individualized or specialized assessment of skill levels, service needs, employment barriers and appropriate employment goals which may include (1) diagnostic testing and assessment tools or (2) in-depth interviewing and evaluation.
Customized Training	Engaged in training customized for a specific employer/individual, for which the employer pays a significant portion of the cost of training. Not ITA eligible.
Eligibility Determination	Applying information collected during program registration to the eligibility criteria to see if an individual is eligible for the program
Financial Aid Information and Application Assistance	Providing significant staff assistance in applying for financial aid including notifying workers that they may request financial aid administrators to use current year income data in determining need.
Individual Employment Counseling	Participant involvement in an individual employment counseling session with a licensed counselor.
Information on Training	Provision of information on: training available in local and regional areas, counseling to determine suitable training and how to apply for training.
Initial Assessment of Interests, Skill Levels & Supportive Service Needs	Initial assessment of skill levels (includes literacy, numeracy, and English language proficiency), aptitudes and interests, and supportive service needs given to all participants, which forms the basis of future services.
Intake and Orientation	Providing introductory information about the job center, including programs and services, in an individual or group setting.
Integrated Education and Training Programs	Providing adult education and literacy activities (including English language acquisition or integrated English literacy and civics education) concurrently and contextually with workforce preparation activities and training for a specific occupation or occupational cluster.
Job Search Assistance	Assistance in planning and carrying out a successful job hunting strategy.
Labor Market Information	Provision of information on state and local labor market conditions, from data sources such as the Bureau of Labor Statistics (BLS), Wisconsin, O*Net, etc.
Occupational Classroom	Engaged in an organized program of study consisting of one or more courses or classes, which when successfully completed leads to one or more of: a recognized postsecondary credential, employment, measurable skills gains towards a recognized credential. ITA eligible.
On-The-Job Training	Limited-term, onsite training provided to a participant by their employer under contract with the WDB. The participant's wages are subsidized by the program. Not ITA eligible.
Out of Area Job Search Assistance	Providing funding or assistance relating to a job search for employment beyond normal commuting distance. May include

- When entering a CEW, supplier ID automatically adds leading zeros so that staff don't have to type them:

Supplier Search

Field: SUPPLIER ID ▼

Criteria: 123

Search

Supplier Search

Field: SUPPLIER ID ▼

Criteria: 0000000123

Search


- Added an Invoice search and default it to current FY:


TAA Invoices

ASSET Invoices Search

Fiscal Year: 2023 ▼

Invoice Number:

Start Date: 

End Date: 

Star Voucher Number:

TAA Creator:

PIN:

Search

- Added a PO search and default it to current FY:

TAA PO Search

Fiscal Year: 2023 ▼

Field: PO # ▼

Operator: Contains ▼

* Criteria:

Search

- Added a fix to the Invoice to not include deleted line amounts in the line balance amount:

Line Items for Benefit Type: Relocation									
Line Number	Line Item Description	Line Amount	Line Balance Amount	New Line Amount	Amount Difference	Codes	Supplier Type	Line Item Status	Invoices
1	Participant Mileage	\$115.83	\$65.83	\$50 <input type="radio"/> Can Invoice in Future <input checked="" type="radio"/> Cannot Invoice	-65.83	ET138,10038	Participant Reimbursement		+
2	Family Mileage	\$115.83	\$65.83	\$50 <input type="radio"/> Can Invoice in Future <input checked="" type="radio"/> Cannot Invoice	-65.83	ET138,10038	Participant Reimbursement		+
3	Food	\$44.55	\$44.55	\$0 <input type="radio"/> Can Invoice in Future <input checked="" type="radio"/> Cannot Invoice	-44.55	ET138,10038	Participant Reimbursement		
4	Cash Payment	\$1,250.00	\$225.00	\$1025 <input type="radio"/> Can Invoice in Future <input checked="" type="radio"/> Cannot Invoice	-225	ET138,10038	Participant Reimbursement		+
Total Order Amount		\$1,526.21	\$401.21						

- We now default TAA Invoice and PO grids to the current Fiscal Year, with ability for staff to change to other years:

Supplier Invoices		
ASSET Invoice #	Invoice Recd Date	Scheduled Payment Date
ASTTAA230000359	03/27/2023	04/16/2023
ASTTAA230000356	03/22/2023	04/11/2023
ASTTAA230000355	03/20/2023	04/09/2023
ASTTAA230000348	02/26/2023	03/18/2023
ASTTAA230000344	02/24/2023	03/16/2023
ASTTAA230000343	02/24/2023	03/16/2023
ASTTAA230000342	01/19/2023	02/08/2023
ASTTAA230000341	01/31/2023	02/20/2023
ASTTAA230000340	11/28/2022	12/18/2022
ASTTAA230000339	11/28/2022	12/18/2022
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- Invoices in PAID or VOID status now fall off the invoice grid on TAA Invoices page after 10 business days (configurable) so that it functions more like a task list.

- Added an invoice search box on the TAA Invoices page

- Enlarged "Supplier Invoice / Remittance Advice #" field to 70 characters:

ASE/SAE Program Improvements

- Modified default value to No for ASE/SAE population and only allow a yes for Admin and is disabled when accessed by non admin population for non- WIOA program Unemployed 27 or more weeks radio button

H1B COW Program Improvements

- 2 additional job titles have been added to H1B COW program services so that more customers can be served:

* Job Title:

* Training Type:

ITA Program ID:

* ITA Program Outcome:

* ITA Employment Outcome:

29-1141.00 ADN Registered Nurse

31-1011.00 Home Health Aide

31-9092.00 Medical Assistant

29-2012.00 Medical and Clinical Lab Technician

21-1011.00 Substance Abuse Counselor

21-1093.00 Social and Human Services Assistant

31-9097.00 Phlebotomists

31-9099.00 Telehealth (Healthcare Support Workers, All Other)

29-2061.00 Licensed Practical Nurse (LPN)

31-1131.00 Certified Nursing Assistant (CNA)

- Event history added to Employment Details page:

[Home](#) / [Customer Search](#) / [Customer Details](#) / [Event History](#)

Event History Summary

[Return To Form](#)

Employment Event History

Create Date	Event Description	Office	By
04/03/2023 10:59:29 AM	Employer Name changed from EmployerC to EmployerD	0610	Scales, Alison

[Page 1](#)

1 row(s) found.

WAI Program Improvements

- Participation dates recognized when a participant withdraws from a participation causing service

Program Name: **Worker Advancement Initiative (WAI)**

Registration Date: [mm/dd/yyyy] [Set As Today](#)

Participation Date:

Exit Date: [mm/dd/yyyy] [Set As Today](#)

- WAI Program Event History Fix

Event History Summary

[Return To Form](#)

Worker Advancement Initiative (WAI) Program Event History

Create Date	Event Description	Office	By
04/03/2023 10:40:15 AM	Exit Date changed from No Value to 04/03/2023	0810	Scales, Alison

[Page 1](#)

1 row(s) found.

- Exit dates are now calculated properly when participant cancels from a participation-causing service:

Program Name: Worker Advancement Initiative (WAI)

Service Information

Service Name: Occupational Classroom Training

Service Category: Worker Advancement Initiative (WAI)

* **Start Date:** [mm/dd/yyyy] [Set As Today](#)

Completion Date: [mm/dd/yyyy] [Set As Today](#)

Outcome / (Completion Code):

* **Funding Source:**

* **Contract ID:**

Outcome / (Completion Code) Dropdown:

- Complete
- Cancelled**
- Withdraw

Staff Request Improvements:

- A link to a Staff E-mail address is now displayed on the Staff Request Detail- Requested By block. On click it opens an email message and defaults the email address.

Completed By:

caution 2000 character limit

Requested By: Kulkarni, Deepa

Staff Type:

Office Code:

WDA: 010-South Central

Email: deepa.kulkarni@dwd.wisconsin.gov

Created: 12/7/2022 10:17:45 AM **By:** ACCOUNTS\KULKADXSXU

Last Updated: 12/8/2022 8:36:03 AM **By:** ACCOUNTS\POWELRXAWQ

[Save](#) [Delete](#)

- Approver can now move non-WIOA staff requests from 'Need more Info' status back to 'Pending' status.

Non WIOA Programs -

1. Apprenticeship
2. DOC Re-Entry
3. STC
4. H-1B Rural Healthcare Grant - COW
5. Worker Advancement Initiative (WAI)

Staff Request Detail

Save

Delete

Staff Request Information:

Request ID:

14439

Request Date:

12/07/2022

Request Type:

Data Change ▾

* Customer PIN:

31166

* Program:

DOC Re-Entry ▾

* Summary:

UAT TEST

* Reason:

UAT

Status:

Needs More Info ▾

Status Change Date:

* Description:

caution 200 character limit

Needs More Info ▾

Pending

Denied

Completed

Needs More Info

QA Review

QA Approve

Withdrawn

- WDA search criteria now persists after change/update to staff requests so that workflow is improved:

Staff Request Summary

Request Type:
Data Change

Search Field:
Status

Filter by Program:

Filter by WDA Code:
010-South Central

* Filter By Status:
Pending

Requested in Past:
Twelve Month

Data Change Request(s)

Request Date	PIN	Summary	WDA#
12/07/2022	31166	UAT TEST	010

Staff Request Summary

Request Type:
Data Change

Search Field:
Status

Filter by Program:

Filter by WDA Code:
010-South Central

* Filter By Status:
Denied

Requested in Past:
Twelve Month

Data Change Request(s)

Request Date	PIN	Summary	WDA#
03/22/2023	33307	Testing NMI notifications	010

Admin Improvements:

- Admin now can edit Comprehensive Assessment date so that staff requests can be completed without developer intervention (Data Update Request or DUR):

caution 2000 character limit

Disability:

☐ CDB
☐ CDS
☐ DD
☐ EBD
☐ LD

School Grade:

English as Second Language:

☐ Yes
☒ No

Certificates of Training Completed:

caution 500 character limit

Training Programs not Completed:

caution 500 character limit

Assessment Date:

January, 2023

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4

Today: February 6, 2023

* Career Planner:

Kulkarni, Deepa

Change Staff

Email:

Staff Type:

- Admin now has the ability to save customer notes with an invalid office code so that staff requests can be completed with historical accuracy:

acc.dwd.wisconsin.gov/det/assetiteration/presentation/CustomerNotesDetails.aspx?CRYPT=T&TWVudVNlbGVjdGlvbj1NQUSBR0VDVNUOT1Fuk5PVEVt&Q3VzdG9rZXIodW1zIX19MTY3NDQ=&Q...

DET Internet and In... Oracle PeopleSoft S... JCW_Tech_Arch_Re... Job Center of Wis... JCW Backlog items... ASSET: ASSET - Cus... JCS Administration... N-JCW Sprint 3 Bac... DET - DET Applicati...

Customer

Case Team

Documents

Job Seeker

Employment

Assessments

Employability Plan

Programs

Services

Exits

Follow-ups

Customer Notes

Job Matching

Customer Reports

Financials

CEPT

* Summary:

Comments:

Summary1
AAAAAAAAAABBBBBBBBNNNNNNNNNNMMMMMMMMVVVVVVVVAAAAAAAABBBB
BBBBBNNNNNNNNNNMMMMMMMMVVVVVVVVAAAAAAAABBBBNNNNNNNN
NNNNMMMMMMVVVVVVVVAAAAAAAABBBBNNNNNNNNNNMMMMMMM
MMVVVVVVVV
caution 2000 character limit

Share with UI:

Mark as Confidential:

Direct Participant Contact:

☒

☐

☐

* Career Planner:

Powell, Rebecca

Change Staff

Email:

Staff Type:

Office Code:

WDA:

Created:

Last Updated:

0233-WRTP:Big Step [INACTIVE]

002-Milwaukee County

3/23/2021 3:13:04 PM

1/19/2023 11:42:36 AM

By: ACCOUNTS\POWELRXAWQ

By: ACCOUNTS\KULKADXSXU

Save

Delete

Event History