

ASSET Technical Bulletin

ASSET Changes – Will be deployed on November 6, 2023

Changes to ASSET Alerts and Notifications

- **Alerts** are items that need some action from you or the participant.
- **Notifications** are informational items that you may want to be aware of, but don't need to take any action on.
- A search/filtering option was added so that staff can view Alerts & Notifications from a specific date range, by alert/notification type, for specific WDA or all WDAs, by PIN or customer's last name:

The screenshot shows two identical search filter sections. The top section is titled 'Staff Alerts' and the bottom section is titled 'Customer Notifications'. Both sections have the same fields: 'Start Date' and 'End Date' (each with a calendar icon), 'Alert Type' (a dropdown menu), 'WDA' (a dropdown menu with '010-South Central' selected), 'PIN' (a text input), and 'Customer's Last Name' (a text input). To the right of each section is an orange 'Search' button. Below the 'Customer Notifications' section, it says '0 Notification(s) found.'

- Notifications now also include an active link to the customer record, which navigates to the Customer Detail page (unless it is of type is Document, where the PIN link then navigates to the Document Summary page).

PIN	First Name	Last Name	Notification Type	Notification Date	Message
33307	Alison	Satu	Case Team	10/27/2023 12:53:35 PM	You are now on the case team
36650	Norman	Beatty	Case Team	10/20/2023 2:02:39 PM	You are now on the case team
36631	Wendy	Teste	Case Team	10/20/2023 12:29:07 PM	You are now on the case team
36630	DOCTEST	DOCTEST	Case Team	10/20/2023 12:21:35 PM	You are now on the case team

- Fixed Column sorting functionality for Notifications grid

CEPT Alerts and Notifications

All existing CEPT Alerts and Notifications can now be managed in ASSET.

1. Alerts
 - Services associated with an employment plan that were planned but never started – Hyperlink on the PIN number navigates to the Services Page in ASSET
 - Action steps associated with a plan that are overdue – Hyperlink on the PIN number navigates to the action steps widget in CEPT
 - Pending Self-sufficiency calculations where the participant has not been notified— Hyperlink on the PIN number navigates to the Self-sufficiency calculation widget in CEPT

Alerts will disappear from your list once the item has been addressed.

2. Notifications

- Participant has shared a budget with staff – Hyperlink on the PIN number navigates to the Budget widget in CEPT
- Participant has signed off on an employment plan -- Hyperlink on the PIN number navigates to the Employment Plan widget in CEPT
- Participant has shared a Self-sufficiency calculation -- Hyperlink on the PIN number navigates to the Self-sufficiency calculation widget in CEPT
- Participant has accepted or rejected a Self-sufficiency calculation -- Hyperlink on the PIN number navigates to the Self-sufficiency calculation widget in CEPT

New Work Authorization Alert

A new alert has been added for the TAA, ADULT, YOUTH, and DW programs. Alert will appear to Career Planner 30 days before participant's work authorization expires. Clicking the PIN link navigates to the participant's program summary page.

11780	Doe, John	Title-1 Program Work Authorization Expiration Date	10/31/2023	Review the Work Authorization Expiration Date in the current Title-1 Program
25052	dillner, Ylime	TAA Program Work Authorization Expiration Date	10/31/2023	Review the Work Authorization Expiration Date in the current TAA Program
36483	record, thirteen	TAA Program Work Authorization Expiration Date	10/31/2023	Review the Work Authorization Expiration Date in the current TAA Program
36486	record, sixteen	TAA Program Work Authorization Expiration Date	10/31/2023	Review the Work Authorization Expiration Date in the current TAA Program

The alert will disappear when the participant exits, or if the authorization date is changed to a future date.