ASSET Technical Bulletin

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ASSET Case Notes and Service Modernization

Production Deploy on June 6th ,2024.

Overview of general changes made in the ASSET Case Notes and Service Modernization

- Customer Notes tab has been moved to the new technology.
- Service Summary page has been moved to the new technology.
- Customer Notes can be added from Service Detail screens with a checkbox.
- Customer Notes will be auto-generated from Employment tab and when customer registration is done for JVSG and WP on ASSET.
- Documents can be uploaded when adding Customer Notes and can be viewed in the Document section on ASSET.
- New fields have been added to the Service Summary page to see if the Service is participationcausing or has " Will Never Start This Services "on it at a glance.
- Programs is added as a Non-Mandatory field on the Customer Notes detail page.

Customer Notes Summary Page

• The Customer Note Summary page has been moved to the new technology. The following is the new page and how to interact with it.

omer	Custo	mer	Note Summ	ary					\oplus	<u>₽</u>	:
Team					O Search						
ments					C Search						
eeker	Note Id	Y	Note Date	Y	Note Summary	Y	Confidential	Y	User Name	Y	
oyment	11830		04/08/2024		Service - Referral to Certified Pre-Apprenticeship F	rogram			Shetty, Sarvika		D*
ssments	11694		04/02/2024		Service - Recruitment Events				Shetty, Sarvika		
oyability Plan	11716		04/02/2024		Service - Eligibility Determination				Shetty, Sarvika		110
ams	44745		0.4/00/00004								~
ces	11715		04/02/2024		Service - Eligibility Determination				Snetty, Sarvika		1
ces (New)	11714		04/02/2024		Service - Incumbent Worker Training		ê		Shetty, Sarvika		D*
	11690		04/02/2024		Test				Shetty, Sarvika		P
w-ups	11238		03/14/2024		Service - Job Readiness Training		ô		Shetty, Sarvika		<i>[</i>]*
omer Notes	11145		03/12/2024		Service - Work Experience				Shetty Sarvika		
maiching			00/12/2021								~
cials	11142		03/12/2024		DOG Re-Entry program created				Snetty, Sarvika		0
	11143		03/12/2024		Orientation service added				Shetty, Sarvika		D*
						F	Rows per page:	10 👻	1-10 of 11	< <	> >

Please Refer to the Appendix for more information on the new technology features

• Use the + symbol to add a new Customer Note.

Custo	omer I	Note Summ	ary						Ð	₽	:
					Q Search						
Note Id	\mathbb{Y}	Note Date	\mathbb{Y}	Note Summary		\mathbb{Y}	Confidential	\mathbb{Y}	User Name	\mathbb{Y}	
11830		04/08/2024		Service - Referral to C	Certified Pre-Apprenticeship Progran	n			Shetty, Sarvika		1
11694		04/02/2024		Service - Recruitment	Events				Shetty, Sarvika		1ª

• Use the pencil icon to View/Edit any existing note. (Based on the users access and permissions)

Custo	omer I	Note Summ	ary						Ð	₫	:
					Q Search						
Note Id	\mathbb{Y}	Note Date	\mathbb{Y}	Note Summary		\mathbb{Y}	Confidential	\mathbb{Y}	User Name	\mathbb{Y}	
11830		04/08/2024		Service - Referral to C	Certified Pre-Apprenticeship Program				Shetty, Sarvika		ľ
11694		04/02/2024		Service - Recruitment	Events				Shetty, Sarvika		1

Customer Notes Details Page

• The Customer Note Details page has been moved to the new technology. The following is the new page and added features.

Please Refer to the Appendix for more information on the new technology features

Customer	Customer Note Delete
Case Team	
Documents	Details
Job Seeker	
Employment	Note Date*
Assessments	4/12/2024 Summary*
- · ····· -·	
Customer	Commentat
Case Team	Comments
Documents	
Case Team	0 / 2000
Documents	
Job Seeker	Programs -
Employment	
Assessments	♦ Share with UI ♦ Mark as Confidential ♦ None Selected
Employability Plan	
Programs	Direct Dation of Contract
Services	
Sērvicēs (Nēw)	
Sērvicēs (Nēw)	Staff Information
Exits	
Follow-ups	
Customer Notes	Shetty, Sarvika Staff Type O810-Dane County Job Center 010-South Central
Job Matching	
Customer Reports -	Created By: Last Updated By:
Financials	
CEPT-	Event History V
Staff Requests	
Referrals	
DES De Empleyment Dien	

ASSET Technical Bulletin –

• Programs is added as a non-mandatory field and is a drop-down to provide more information about the Customer Note`

Programs			Ŧ
Title I			
WAI			
RESEA			
ТАА			
VETS			
STC			
Cäreer'manner'	Uffice Coae*	WDA	

- Documents can be uploaded from this page using the Icon.
 - Program, Purpose and Document type needs to be added.
 - The document would be chosen and then click Submit. This document can be viewed on the Documents area

	Customer Note	
	Details	^
	Note Date* 4/12/2024 Summary*	
Up	pload Documents - John Doe 11780	SUBMIT
F	Programs* Purpose* ADD PRO	GRAM/PURPOSE
[Document Types*	
	CHOOSE FILE Only doc, docx, xls, xlsx, gif, jpg, pdf, png documents up to 25 MB can be uploaded.	
	 The file name cannot contain special characters (such as &, #, @). Your documents will be scanned for viruses during the upload process. If a virus is found, your document will not be uploaded. 	

Service Summary Page

• The Service Summary page has been moved to the new technology. The following is the new page and how to interact with it.

Please Refer to the Appendix for more information on the new technology features

	WICA Progra													
	Title 3	R	Registrati	ion Date	e: P	articipation Date:	Staff:						(Ŧ):
		0	09/26/20	23										
	Support to	R	Registrati	ion Date	e: P	articipation Date:	Staff: Shetty, Sa	arvika					(+):
	Communities	0	03/12/20	24	0	3/14/2024							Ŭ	•
	Non-WIOA Pr	rograr	m(s)											
	SAE 2020 Grant fo	or		Reg	jistration D	ate: 03/13/2024	Staff: Shetty, Sa	arvika					(†):
	Apprenticeship													•
	Apprenticeship Pi	peline		Reg	jistration D	ate: 03/13/2024	Staff: Shetty, Sa	arvika					(+):
	H-1R Dural Health	loaro Gra	ant -	Pog	victration D	ata: 02/12/2024	Ctoff: Chotty C	anvika						
	COW	icare Gra	anı -	ĸeg	jistration D	ale: 03/12/2024	Stall: Shelly, Se	divika					(+):
	Summer Youth			Rea	istration D	ate: 03/12/2024	Staff: Shetty, Sa	arvika					<u> </u>	•
				ncg			chain onerty, or						÷	י נ
	DOC Re-Entry			Reg	jistration D	ate: 03/12/2024	Staff: Shetty, Sa	arvika					(f):
													U	•
	History - Clos	sed N	lon-W		Progra	m(s)								
	History - Clos Worker Advancem	sed No	Ion-W	I <mark>OA</mark> Re	Progra	m(s) Date: 03/13/2024	Exit Date: 04	/10/2024	Sta	f f: Shetty,	Sarvika	1		:
ent Plan	History - Clos Worker Advancem (WAI)	sed No	lon-W	I <mark>OA</mark> Re	Progra egistration	<mark>m(s)</mark> Date: 03/13/2024	Exit Date: 04	1/10/2024	Sta	ff: Shetty,	Sarvika	1		:
Plan	History - Clos Worker Advancem (WAI) WIOA Program	sed No hent Initia m(s) R 0 ¹	lon-W iative Registrati	IOA Re ion Date 23	Progra egistration e: Pa	<mark>m(s)</mark> Date: 03/13/2024 urticipation Date:	Exit Date: 04 Staff:	1/10/2024	Sta	ff: Shetty,	Sarvika	1	Ð	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3	sed No ment Initia m(s) R	lon-W iative Registrati 09/26/202	IOA Re ion Date	Progra egistration e: Pa	m(s) Date: 03/13/2024 Intricipation Date:	Exit Date: 04 Staff:	1/10/2024	Sta	ff: Shetty,	Sarvika	Participation	÷	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name	sed No nent Initia m(s) R 0 7	lon-W iative Registrati 09/26/202 Area	IOA Re ion Date 23	Progra agistration e: Pa Fund	m(s) Date: 03/13/2024 Inticipation Date: Ty Open Date Ty	Exit Date: 04 Staff: Close Date T)/10/2024 Office	Sta	ff: Shetty, Staff Id	Sarvika	Participation Causing	Ð	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RFS	sed No ment Initia m(s) R O	iative Registrati 19/26/202 Area	IOA Re ion Date 23	Progra egistration e: Pa Fund	m(s) Date: 03/13/2024 Inticipation Date:	Exit Date: 04 Staff: Close Date	1/10/2024 Office	Sta	ff: Shetty, Staff Id	Sarvika	Participation Causing	()	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self	sed No nent Initia m(s) R 00 7	Ion-W iative Registratio 09/26/202 Area T3	ion Date	Progra agistration e: Pa Fund ` RESEA	m(s) Date: 03/13/2024 Intricipation Date:	Exit Date: 04 Staff: Close Date Y 12/26/2023	0/10/2024	Sta ▼	ff: Shetty, Staff Id	Sarvika T	Participation Causing No	(+)	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self Service	sed No ment Initia m(s) R 00 7	lon-W iative Registrati 09/26/202 Area T3	ion Date	Progra egistration e: Pa Fund ¹ RESEA	m(s) Date: 03/13/2024 Intricipation Date: The second secon	Exit Date: 04 Staff: Close Date V 12/26/2023	0/10/2024 Office 0810	Sta	ff: Shetty, Staff Id	Sarvika	Participation Causing No	Ŧ	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self Service Online RES Orientation Self	sed No ment Initia m(s) R 0' 7	lon-W iative Registrati 09/26/202 Area T3	ion Date	Progra agistration e: Pa Fund ¹ RESEA	m(s) Date: 03/13/2024 Intricipation Date:	Exit Date: 04 Staff: Close Date Y 12/26/2023 12/26/2023	0/10/2024	Sta	ff: Shetty, Staff Id	Sarvika ▼	Participation Causing No	(:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Online RES Orientation Self Service Online RES Assessment Se Service	sed No eent Initia m(s) R 0' 7	lon-W iative Registrati 09/26/202 Area T3	IOA Re	Progra egistration e: Pa Fund ` RESEA RESEA	m(s) Date: 03/13/2024 urticipation Date: Y Open Date 12/26/2023 12/26/2023	Exit Date: 04 Staff: Close Date 7 12/26/2023	0 ffice 0810	Sta	ff: Shetty, Staff Id	Sarvika 7	Participation Causing No No	⊕	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self Service Online RES Assessment Se Service Online Self-Ser	sed No eent Initia m(s) R Q 7	lon-W iative Registratii 09/26/202 Area T3	(IOA) Re ion Date 23	Progra egistration e: Pa Fund ` RESEA RESEA	m(s) Date: 03/13/2024 articipation Date:	Exit Date: 04 Staff: Close Date 7 12/26/2023 12/26/2023	0 ffice 0810	Sta	ff: Shetty, Staff Id	Sarvika Y	Participation Causing No No	⊕	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self Service Online RES Assessment Se Service Online Self-Ser and Information	seed No eent Initia m(s) R 0 7 5 5 5 6 6 7 6 7 6 7 7 7 7 7 7 8 1 7 7 8 1 7 8 1 9 7 8 1 9 1 9 1 9 1 1 1 1 1 1 1 1 1 1 1 1 1	lon-W iative Registratii 09/26/202 Area T3 T3	(IOA) Re ion Date 23	Progra egistration e: Pa Fund ` RESEA RESEA	m(s) Date: 03/13/2024 articipation Date: ▼ Open Date ▼ 12/26/2023 12/26/2023 09/26/2023	Exit Date: 04 Staff: Close Date 7 12/26/2023 09/26/2023	V/10/2024 Office 0810 0810	Sta	ff: Shetty, Staff Id	Sarvika Υ	Participation Causing No No No	⊕	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Name Online RES Orientation Self Service Online RES Assessment Se Service Online RES Assessment Se Service	sed N ment Initia m(s) R 0 V V	lon-W iative Registrati 09/26/202 Area T3 T3	IOA Re ion Date 23	Progra egistration e: Pa Fund ' RESEA RESEA JCW	m(s) Date: 03/13/2024 articipation Date: ▼ Open Date ▼ 12/26/2023 12/26/2023 09/26/2023	Exit Date: 04 Staff: Close 7 Date 7 12/26/2023 1 09/26/2023 0	V/10/2024 Office 0810 0810	Sta	ff: Shetty, Staff Id	∑ ∑	Participation Causing No No No	⊕	:
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Online RES Orientation Self Service Online RES Assessment Se Service Online RES Assessment Se Service	sed N. m(s) ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽ ₽	lon-W aative Registrati 09/26/202 Area T3 T3 T3	IOA Re ion Date 23 ♥	Progra egistration e: Pa Fund ' RESEA RESEA JCW	m(s) Date: 03/13/2024 articipation Date: ▼ Open Date ▼ 12/26/2023 12/26/2023 09/26/2023	Exit Date: 04 Staff: Date 7 12/26/2023 12/26/2023	V/10/2024 Office 0810 0810 0810	Sta	ff: Shetty, Staff Id	Sarvika ▼	Participation Causing No No No	⊕	: : //
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Online RES Orientation Self Service Online RES Assessment Se Service Online Self-Ser and Information Activities	sed N m(s) R 0 √ √	lon-W iative Registrati 09/26/202 Area T3 T3 T3	IOA Re ion Date	Progra egistration e: Pa Fund ` RESEA JCW e: Pa	m(s) Date: 03/13/2024 Intricipation Date: ✓ Open Date ✓ Open Date 12/26/2023 09/26/2023	Exit Date: 04	V/10/2024 Office 0810 0810 vika	Sta	ff: Shetty, Staff Id	Sarvika T	Participation Causing No No No	⊕	: : : : : : : : : : : : : : : : : : : :
	History - Clos Worker Advancem (WAI) WIOA Program Title 3 Service Online RES Orientation Self Service Online RES Assessment Se Service Online Self-Sern and Information Activities	sed N. m(s) R 0 ∑ £ t- t- t- t- t- t- t-	Con-W iative Registratio 09/26/202 Area T3 T3 T3 Registratio	IOA Re ion Date 23	Progra egistration e: Pa Fund ` RESEA RESEA JCW e: Pa	m(s) Date: 03/13/2024 irticipation Date: ▼ Open ▼ 12/26/2023 12/26/2023 09/26/2023 urticipation Date: v/14/2024	Exit Date: 04 Staff: Date 7 12/26/2023 12/26/2023 09/26/2023	V/10/2024 Office 0810 0810 0810	Sta	ff: Shetty, Staff Id	Sarvika T	Participation Causing No No No	 ⊕ ⊕ 	:

• New Services can be added with the + Icon on every program accordion:

Title 3	Registration Date		Р	articipa	tion Date	::	Staff									G
	09/26/2023															
Service Name	Y	Area	Y	Fund	Y	Open	Date 🏹	Clos	se Date 🛛 🍸	,	Office	Y	Staff Id	Y	Participation Causin	a V
Online RES Orientation Sel	f-Service	T3		RESE	Δ	12/26/2	023	12/2	6/2023		0810				No	
	-16 0					10,000		10.0	0.0000							
Unline RES Assessment Se	en-Service	13		RESE	٩	12/26/2	023	12/2	6/2023		0810				NO	
Online Self-Services and In	formational Activities	Т3		JCW		09/26/2	:023	09/2	6/2023		0810				No	
Support to Communities	Registration Date		Р	articipa	tion Date	:	Staff	: Shetty,	Sarvika							
	03/12/2024		0	3/14/20	24											
Service Name		Y	Area	Y	Fund	Y	Open	Y	Close	Y	Offi	ice 🤊	Staf	ff S	Participation	Y
							Date		Date				Id		Causing	
Initial Assessment of Inter	ests, Skill Levels & Su	oportive	STC		STC		03/14/2024		03/14/2024		081	0	She	tty, Sarv	ika Yes	
Service Needs																
															•	
Non-WIOA Program	(c)															
SAE 2020 Grant for Approprie	(S)	onintratio	on Data	02/12/	2024		Staff	Chatty	Sarvika							
SAE 2020 Grain for Apprentic	cosinp R	egistratit	on Date.	. 03/13/	2024		otari	. onerty,	Salvika							
	V F u = d			Onen	Date		V	Close D	Date		V	Office			Staff Id	Y
Service Name	Y Fund			open	Dute											

• Use the Pencil symbol to View/edit an already existing service (Access requirements are the same)

																-
	Title 3	Registration	Date:		Participati	on Date	e:	Staff:								÷
	Service Name		🝸 Area	Y	Fund	Y	Open Date	Y	Close Date	Y	Office	Y	Staff Id	Y	Participation Causing	Y
	Online RES Orientation Se	If-Service	Т3		RESEA		12/26/2023		12/26/2023		0810				No	Г
5		alf Camilaa					10.00.0000		10/00/0000							
Plan	Unline RES Assessment S	sen-service	13		RESEA		12/26/2023		12/26/2023		0810				NO	
	Online Self-Services and I	nformational Activ	ities T3		JCW		09/26/2023		09/26/2023		0810				No	L
w)	Support to Communities	Registration	Date:		Participati	on Date	e:	Staff:	Shetty, Sarvika							
		03/12/2024			03/14/202	4										Ð
tes	Service Name		V	Area		Fund	⊽ ^{Ope}	n	∇ Close		⊽ o	ffice	⊽ Sta	ff s	Participation	V
1							• Dat	9	Date		<u> </u>		' Id		Causing	
ports -	Initial Assessment of Inte	rests, Skill Levels	& Supportive	STC		STC	03/1	4/2024	03/14/20	24	0	10	She	etty Sarv	ika Yes	— Г
	Service Needs													,		L
ts																
oloyment Plan	Non-WIUA Program	i(s)														-
	SAE 2020 Grant for Apprenti	iceship	Registrat	ion Date	a: 03/13/2	024		Staff:	Shetty, Sarvika							\oplus
	Service Name	∑ Fu	nd	Y	Open D	ate		7 <u>(</u>	Close Date		Y	Offic		Y	Staff Id	Y

• Participation Causing is a new column added with "Yes" or "No" values to indicate if the Service causes participation.

Title 3	Registration Dat	e:	F	Participatio	on Date:		Staff:								(Ð
	09/26/2023															
Service Name	Ŷ	Area	Y	Fund	Y	Open Date	Y	Close Date	Y	Offic	e 🏹	Staf	fid 🍸	Participation Causing	9 Y	
Online RES Orientation S	elf-Service	тз		RESEA		12/26/2023	;	12/26/2023		0810				No		<u> </u>
Online RES Assessment	Self-Service	Τ2		DESEA		10/06/0000		10/06/0000		0910				No	-	
Unine RES Assessments	Self-Selfice	15		RESEA		12/20/2023		12/20/2023		0010				NU	-	
Online Self-Services and	Informational Activitie	s T3		JCW		09/26/2023		09/26/2023		0810				No		
Support to Communities	Registration Dat	e:	F	Participatio	on Date:		Staff:	Shetty, Sarvik	a						6	-
	03/12/2024		C	03/14/2024	4											Ľ
																_
Service Name		Y	Area	7 I	Fund	∇ ^{Op}	en	Y Clos	9	v	Dffice	7	Staff	Participation	Y	
						Da	te	Date					10	Causing		
Initial Assessment of Inte	erests, Skill Levels & S	upportive	STC		STC	03/	14/2024	03/14	/2024	(0810		Shetty, Sa	arvika Yes		
Service Needs																
														•		_
Non-WIOA Program	n(s)															
SAE 2020 Grant for Apprent	ticeship	Registrati	ion Date	: 03/13/20	024		Staff:	Shetty, Sarvik	a							-
		giotiat						, our me								t
			-				-			_					-	
Service Name	∀ Fund		Y	Open Da	ate		7 (Close Date		Y	Offic	e	7	7 Staff Id	Y	

• The Open dates will populate as "N/A" if the Service is marked " Will Never Start This Service "

	1	WIOA Program(s	;)															
		Title 3 JVSG		Registra	ation Da	ate:	P	Participation Date:		Begin Date:	12/28/	2023	End D	ate:		Staff: Kulkarni, Deepa	(Ŧ):
im				11/23/2	2022		0	2/26/2024										•
nts																		
er		Service Name	Y	Area	Y	Fund	Y	Open Date	Y	Close Date	Y	Office	Y	Staff Id	Y	Participation Causing	Y	
ient		Career Planning		Т3		JVSG		04/05/2024		04/05/2024		0810		Kulkarni, D	еера	Yes		1ª
ents																		
bility Plan																		
		Title 1 Dislocated Work	er	Registra	ation Da	ate:	P	Participation Date:		Begin Date:	02/14/	2023	End D	ate: 02/14/20	023	Staff: Kulkarni, Deepa	÷) :
		(12/08/2	022													
(New)		Service Name	V	Area	V	Fund	V	Open Date	V	Close Date	V	Office	V	Staff Id	V	Participation Causing	V	
os		Housing Assistance		DW		WIODW		02/14/2023		02/14/2023		0810		Kulkarni, D	eepa	NO		/
r Notes																		
hing		Title 1 Adult		Registra	ation Da	ate:	P	Participation Date:		Begin Date:	12/08/	2022	End D	ate:		Staff: Kulkarni, Deepa	Æ	•
r Reports				12/08/2	2022												ড	' :
S																		
		Service Name		🖓 Area	• °	7 Fund	۲	7 Open Date	Y	Close Date	Y	Office	Y	Staff Id	Y	Participation Causing	Y	
uests (52)		Apprenticeship Train	ing	AD		WIOAI	D	N/A				0810		Kulkarni, I	Deepa	Yes		11
(23)		Childcare Assistance	•	AD		WSAC)	N/A				0810		Kulkami	Deena	No		112
Employment Plan			-	AU		WORG						0010		r cancerni, i	ocopa			<i>°</i>
		Adult Education and	Litorac			OTH		NI/A				0040		Kulkoroi	Doopo	Voo		120

• Title 3 JVSG is separated out in a new Accordion, where all the fund Sources are JVSG. When clicking the + sign to add new services. The Service eligibility screen has default options selected as seen in the screenshot below. These can be changed as needed.

	WIOA Program(s)						
Customer	Title 3 JVSG	Registration Date:	Participation Date:	Begin Date: 01/02/2024	End Date:	Staff: Kulkarni, Deepa	Э :
Case Team		07/25/2023	03/01/2024				
Documents	Title 1 Dislocated Worker	Registration Date:	Participation Date:	Begin Date: 01/06/2021	End Date:	Staff: Scales, Alison	⊕ : √
Job Seeker		11/10/2020	01/24/2021				<u> </u>
Employment	Title 1 Adult	Registration Date:	Participation Date:	Begin Date: 11/10/2020	End Date:	Staff: Powell, Rebecca	(†) : ~
Assessments		11/10/2020	01/24/2021				<u> </u>
Employability Plan	Title 3	Registration Date:	Participation Date:	Staff: Amin, Sanyukta			• ÷ •
Programs		07/25/2023	03/01/2024				-
Services	TAA	Registration Date:	Participation Date: 12/06/2021	Staff: Borra, Sahithya			• 🗄 🗄 ~
Services (New)	Current to Communities	Desistantian Date:	Participation Date:	Ctaffi Caolao Aliaon			
Exits	Support to Communities	08/01/2023	Participation Date.	Stall. Scales, Alison			(+) : ~
Follow-ups							
Customer Notes							
Job Matching	History - Closed WIC	DA Program(s)					
		Desistantian Date:	Destisientien Deter		01- <i>11</i> -		
Customer Reports -	Title 3	Registration Date:	Participation Date:	Exit Date: 04/06/2020	Statt:		: ~
Customer Reports - Financials	Title 3	08/16/2017	Participation Date:	Exit Date: 04/06/2020	Statt:		: ~
Customer Reports - Financials CEPT -	Title 3 Title 3	08/16/2017 Registration Date: 09/29/2015	Participation Date:	Exit Date: 04/06/2020 Exit Date: 04/08/2016	Staff:		• • • •
Customer Reports - Financials CEPT - Staff Requests (13)	Title 3	Registration Date: 08/16/2017 Registration Date: 09/29/2015	Participation Date:	Exit Date: 04/06/2020 Exit Date: 04/08/2016	Staff:		: ~
Customer Reports - Financials CEPT - Staff Requests (13) Referrals	Title 3 Title 3 Title 3	Registration Date: 08/16/2017 Registration Date: 09/29/2015 Registration Date: 08/04/2008	Participation Date: Participation Date: Participation Date:	Exit Date: 04/06/2020 Exit Date: 04/08/2016 Exit Date: 08/04/2008	Staff: Staff:		: ~ : ~ : ~

ASSET Technical Bulletin -

Service Eligibility Program Information: Title 3 - JVSG	
Service Category:	Individualized Career Services 🗸
Veteran Specific Services Only:	

 Title 1 Youth, Adult and Dislocated Worker are separated out in new accordions but will have a overall Title 1 accordion which will contain the Program Participation information .

anage Customers - Staff - Posting	Tools - RES Tools - System Report										
	WIOA Program(s)										
	Worker	Registration: 5/20/20	£ 4)								
	Program Participation										^
nt	[_							
its	No Participation found for	the Title 1 Adult/Disloca	ted WorkerTitle 1	Program.							
ity Plan	Title 1 Adult	Registration: 05/20/2	024 Particip	ation:	Begin: 05/	20/2024	End:		Staff: Shetty, Sarvika	A :	•
ld)	Consider Name	▽ ▲ ▽	Fund N	7 0		∀ 0/5	₩ 84-6		Destining disc Ormains	∇	
	Service Name	y Area y	Fund Y	Open	Y Close	Y Office	y stan	r ¥	Participation Gausing	¥	
	Child Care	AD	OTH			0810	Shet	ty, Sarvika	No	1	
	Community Service Block	Grant AD	OTH	N/A		0810	Shet	ty, Sarvika	No	01	
lotes											
ng		Desidentia anti-		- 41	B	00/0004	Post.			0	
Reports	Title 1 Dislocated Worker	Registration: 05/20/2	024 Particip	ation:	Begin: 05/	20/2024	End:		Staff: Shetty, Sarvika	⊕ :	^
	Service Name 🛛 🏹	Area 🍸 F	und 🏹	Open 🏾 🍸	Close	7 Office	∑ Staff	Υ I	Participation Causing	Y	
ests	Apprenticeship Training	DW V	IODW			0810	Shetty,	Sarvika 1	Yes	11	
	Needs Related Payment	DW V	/\$40	N/A		0810	Shetty	Sarvika I	No	115	
	Title 3	Registration: 09/26/202	3 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika				(^
	Title 3	Registration: 09/26/202	3 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika				÷ :	^
	Title 3 WIOA Program(s)	Registration: 09/26/202	3 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika				÷ :	^
	Title 3 WIOA Program(s) Title 1 Adult/Dislocated	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika				⊕ :	^
	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika				÷	^
	Title 3 WIOA Program(S) Title 1 Adult/Dislocated Worker Program Participation	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika				•	^
	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika				÷ .	^
ıt	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group	Registration: 09/26/207 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatic	n			÷ :	^
it ts ty Plan	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatic 3/5/2021	'n			⊕ : ^	^
ıt Is ty Plan	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG POC	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatic 3/5/2021 3/7/2024	'n			÷:	^
it ts ty Plan itd)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 4	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participati 3/5/2021 3/7/2024	'n			÷:	
it ts ty Plan kd)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021	'n			⊕ : ∕	
it ts ty Plan ild)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021	'n			÷ :	
ıt ts ty Plan Ild)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatic 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/24/2021	'n			÷:	
it Its Ity Plan Itd)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatic 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/24/2021	n			÷:	
ıt ts ty Plan Id) Idos 19	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Dislocated Worker	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/2/2024	n End:		Staff: Powell, Rebecca	•	
it ts ty Plan Id) kotes 19 teports	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Dislocated Worker	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20 20 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/24/2021 1/2/2024	n End:		Staff: Powell, Rebecca	⊕ :	
it ts ty Plan kd) kotes ng teports -	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Adult	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20 20 20 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/2/2024 0/2020	n End:		Staff: Powell, Rebecca	⊕ :	
it ts ty Plan kd) kotes kg Reports -	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Adult Service Name	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20 20 20 Participa 20 Participa	tion: 05/24/2024	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/2/2024 0/2020 Close Y	n End: Office _7	Staff	Staff: Powell, Rebecca	⊕ :	
nt Its Ity Plan Hd) Hotes ng teports -	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Dislocated Worker Title 1 Adult	Registration: 09/26/202 Registration: 11/10/20	3 Participa 20 20 20 Participa 7 Area 7	tion: 05/24/2024 tion: 01/24/2021 ′ Fund ♀	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/2/2024 0/2020 Close V	n End: Office Ÿ	Staff	Staff: Powell, Rebecca	 ⊕ : 	
it Its ty Plan Id) Idies 1g teports -	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Adult Service Name Comprehensive Individuat	Registration: 09/26/202 Registration: 11/10/20 Registration: 11/10/20	3 Participa 20 20 Participa 20 Participa 7 Area 7 ment AD	tion: 05/24/2024 tion: 01/24/2021 Fund Y WSAO	Staff: Shet	ty, Sarvika Participatio 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/2/2024 0/2020 Ciose V 0/4/02/2024	n End: Office V 0810	Staff Shetty, S	Staff: Powell, Rebecca	⊕ : ~	
it Its ty Plan Id) Idi Reports - sits (12)	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Dislocated Worker Title 1 Adult Eligibility Determination	Registration: 09/26/202 Registration: 11/10/20 Registration: 11/10/20 Registration: 11/10/20	3 Participa 20 20 20 Participa 20 Participa 20 Participa 20 Area	tion: 05/24/2024 tion: 01/24/2021 ✓ Fund ∇ WSAO OTH	Staff: Shet Begin: 11/1 Open ▼ 04/02/2024 03/07/2024	ty, Sarvika Participatu 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/22/2024 0/2020 Close V 04/02/2024 03/07/2024	n End: Office ▼ 0810 0810	Staff Shetty, S Shetty, S	Staff: Powell, Rebecca V Participation Causing arvika Yes arvika No	⊕ : .	
it ts ty Plan Id) kotes ig teports - sists (12) nployment Plan	Title 3 WIOA Program(s) Title 1 Adult/Dislocated Worker Program Participation Participation Group DWG RRG Title 1 Title 1 Adult Title 1 Dislocated Worker Title 1 Dislocated Worker Title 1 Adult Eligibility Determination Apprenticeship Training	Registration: 09/26/202 Registration: 11/10/20 Registration: 11/10/20 zed or Specialized Assess	3 Participa 20 20 20 Participa 20 Participa 20 Area 7 ment AD AD AD	tion: 05/24/2024 tion: 01/24/2021 Fund Y WSAO OTH OTH	Staff: Shet Begin: 11/1 Open ▼ 04/02/2024 03/07/2024 01/04/2024 01/04/2024	ty, Sarvika Participatic 3/5/2021 3/7/2024 1/24/2021 1/24/2021 1/24/2021 0/2020 Close V 04/02/2024 03/07/2024 03/07/2024 01/04/2024	n End: Office ▼ 0810 0810	Staff Shetty, S Shetty, S Kulkarni,	Staff: Powell, Rebecca Participation Causing iarvika Yes iarvika No Deepa Yes	⊕ :	

Service Detail Page

• New element is added caused "Participation causing" to convey if the Service causes participation.

	1 Customer Search / Custo	omer Details / Services Summary	/ Service Details	
Customer	Service Details	\$		
Documents		0		
Job Seeker		Save		Delete
Employment				Delete
Assessments				
Employability Plan			Event History	
Programs				
Services Services (New)				
Exits	Program Name:		Title 3 - JVSG	
Follow-ups				
Customer Notes	Service Information		Induidual Employment Counseling	
Job Matching	Service Category:		Individual Employment Counseling	
Customer Reports	Participation Causing:		Yes	
Financials	* Onen (One of the following is	an annian all		
Staff Requests (13)	Open: (One of the following is	required)		
Referrals	Planned Service Date:	03/07/2024 [mm/dd/yyy	y] Set As Today	
RES Re-Employment Plan				
	Actual Service Date:	03/07/2024 [mm/dd/yyy	y] Set As Today	
	* Close: (One of the following is	required)		
	Planned Service Date:	03/07/2024 [mm/dd/yyy	y] Set As Today	
	Actual Service Date:	03/07/2024 [mm/dd/yyy	y] Set As Today	
	* Funding Source:	JVSG V		

- Customer Notes can be generated from the Service Summary pages for both WIOA and Non-WIOA programs.
 - The "Actual Close Date" or "Completion date " must be populated in order for the "Create Note" Checkbox to show up
 - The Customer note will contain the following information:
 - (Note date = todays date

•

- Summary = Service [Service Name]
 - --EX: Service Labor Market Info
- Contents =Service Name [DATA ENTERED IN COMMENTS FIELD] followed by the staff ID/name, followed by a statement that this is a system-generated note
 - --EX: Labor Market Info Spoke with Joe to confirm he received the LMI info I sent him. ACCOUNTS\scaleacymj/*Scales, Alison.* This is a system-generated note.
 - *Note In the By section Display Date and Time*

	🔒 / Customer Search / Cust	omer Details / Service Summary / Service Details
Customer Case Team	Service Detail	8
Documents	Corrice Dotai	~
Job Seeker		Save
Employment		Datata
Assessments		
Employability Plan		Event History
Programs		
Services		
Services (New)	Program Name:	Second to Connectives
Exits		ang para sa saananaa ay a
Follow-ups Curclement Notes	Service Information	
Job Matching	Service Name:	Initial Assessment of Interests, Skill Levels & Supportive Senvice Needs
Customer Reports	Service Category:	Basic Career - Staff Assisted
Financials	Participation Causing:	195
CEPT	* Open: (One of the following is	required)
Customer Notes		
Job Matching	Planned Service Date:	04/16/2024 [mm/dd/yyyy] Set As Today
Customer Reports		
Financials	Actual Service Date:	04/16/2024 [mm/dd/yyyy] Set As Today
CEPT		
Statt Requests Referrals	 ulose: (One of the following it 	tudnikali
RES Re-Employment Plan	Planned Service Date:	04/15/2024 [mm/dd/yyyy] Set As Today
Exits		
Follow-ups	Actual Service Date:	04/16/2024 [mm/dd/yyyy] Set As Today
Customer Notes		
Job Malching	* Funding Source:	STC -
Customer Reports	Grant identifier:	
FRAKER	Quality in Paralament	
CEPT	 Qualitying Employer. 	lest amproyer Select Employer
Staft Requests Job Matching		
Customer Reports	 Contract ID: 	10-0007 Select Contract ID
Financials		
CEPT -		Remove Contract ID
Colorina autor	Old Contract ID:	
Job Matching	ON CONTROL ID.	
Customer Reports	 List Assessment(s) and Assessment Provider(s); 	Test
Financials		
Financials		
CEPT		
Staff Requests		
Referrals		
RES He-Employment Plan Follow-ups	Provider Name:	
Customer Notes	Location of Service Provision	
Job Matching	Commente	
Customer Reports	Comments:	
Financials Financials		
CEPT-		Caution: 500 character
	Completion Code:	Completed This Service v
Customer Reports		
Financials	Create Customer Note:	tā Yes
CEPT		
Staff Requests		
Referrals	e Career Elanoer	Shaw Service Servi
RES Re-Employment Plan	and the second second	Change Starr
	Staff Type:	v
	* Office Code:	0510-Dane County Job Center 👻
	WDA:	010-South Central
	Course	p
	Last Listated	By:
	Optimu	M).
		Save
		Delate
		Event History

- ITA Program look up updated. On Services where ITA is established and ITA Program ID needs to be selected using the "Select an ITA Program ID" button, an ITA Program lookup pop-up shows up with 2 versions.
 - Select Version 2 (Current ETPL Website) for all occupational classroom services with a planned or actual start date on or after 12/02/2019.
 - On the Version 2 there a new look up field titled "ITA Program ID" where The Program ID can be used to Search.

ervices (New)			-	_		
		ITA Established:	۲	Yes 🔿 No 🔿 No Response		
ustomer Notes	*	ITA Number:				
ob Matching						
ustomer Reports		ITA Program ID:		Select an ITA Program ID		
inancials						
EPT-		ITA Program Name:				
taff Requests (14)		ITA Program Provider:				
elerrais		TTA Program Location:				
ES Re-Employment Plan		Course:		Add Course		
	*	ITA Program Outcome:		~		
	*	ITA Employment Outcome:		~		
		ITA Outcome Comment:				
					caution 1000 character	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
					limit	
	Ormalati, C. I				limit	
📥 ASSET: ASSET	- ITA Program Lookup - \	Work - Microsoft Edge	- 0 X	~		
Ĥ https://a		/det/assetiteration/presentation/	/ITAProgramLo A ^ℕ			
	TA Program Lookur					
ASSETT	HA Program Lookup	,	0 N	o 🔿 No Response		
Select Vers	ion 2 (Current ETPL	Website) for all occupational clas	ssroom services			
with a plann	ned or actual start dat	te on or after 12/02/2019.				
Only select	Version 1 (Old ITA V	Vebsite) for occupational classroo	om services that	oct on ITA Brogram ID		
were planne	ed or actually started	before 12/01/2019.	Sele			
* 174	Version:	Select ¥				
				Add Course		
				~		
				~		
						<i>h</i>
					caution 1000 character limit	
ASSET - ITA Program Lookup						
	Select Version 2 (Current ETPL Website) for all occupat	tional classroom services with a pla	nned or actual start date on or after 12/02/2019.		
	Only select Versio	n 1 (Old ITA Website) for occupationa	al classroom services that were plan	ned or actually started before 12/01/2019		
	* ITA Versio	n:	Version-2 V	published		
	Training P	rovider:				
	ITA Progra	im ID:			Search	
					Search	
	Brogram ID	Provider Name	Brogram Location	Brogram Nama		
	00172_00001	Liniversity of Wisconsin Green Pay		RA program	Detailed Info	
	00156 00002	Training Institution 1	Online	test of accredited	Detailed Info	
	00156 00003	Training Institution 1	Online	WTCS Created on 6/22/2020	Detailed Info	
	00233_00001	2 Institution Examples	Online	NAme	Detailed Info	
	00003_00036	Training Institution 2	MADISON, Madison	check2 program	Detailed Info	
	00003_00042	Training Institution 2	Online	test for wtcs	Detailed Info	
	00003 00044	Training Institution 2	Online	test for establishment date	Datailad Info	

• The Funding source "Vets VR&E" has been removed from TAA services.

Service Details	S	
	Save	Delete
	Event History	
Program Name:	TAA	
Service Name:	Apprenticeship Training	
Service Category: * Open: (One of the following is r	Training Services	
Planned Service Date:	[mm/dd/yyyy] Set As Today	
Actual Service Date: * Close: (One of the following is a	required)	
Planned Service Date:	[mm/dd/yyyy] Set As Today	
Actual Service Date:	[mm/dd/yyyy] Set As Today	
* Funding Source: Contract ID:	TAA Pell or other financial aid Other Non-WIA Other DVR	Select Contract ID Remove Contract ID
* Funding Source:	~	
Contract ID:	VETS VR&E TAA Pell or other financial aid Other Non-WIA Other DVR	

• If there is no data in the Old Contact ID field it will be hidden on the Service details page.

Work-key services which are no longer in use are removed from Title 3 Service eligibility page. This will • not affect already existing or historical WorkKeys service records.

Sonvice Eligibility	
Program Information - Title 3	
Service Category: All Service	
Service Name	
Ability Profiler	Service Eligibility
Adult Education (WIOA Title II)	Program information - True a
Career Planning	Service Category: All Services
Case Management	Veteran Specific Services Only:
Child Care	Service Name
Childcare Assistance	Ability Profiler Adult Education (WIQA Title II)
Children First Community Service Block Grant	Career Guidance
Comprehensive Individualized or Specialized Assessment	Career Hanning
Department of Corrections	Case Management
Eligibility Determination FoodShare Employment & Training	Child Care Childcare Assistance
Group Employment Counseling	Children First
H1-8 Housing Assistance	Community Service Block Grant Comprehensive Individualized or Specialized Assessment
IEP Initial Development	Denartment of Connections
IEP Review Individual Employment Counseling	Eligibility Determination
Individual Re-Employment Plan Development	FoodShare Employment & Training Group Employment Counceling
Information about Eligible Training Programs (ETPs) Information on Local Area Performance	H1-8
Initial Assessment of Interests, Skill Levels & Supportive Service Needs	Housing Assistance
	IEP Review
	Individual Employment Counseling
Intake and crientation Integrated Education and Training Programs	Information about Eligible Training Programs (ETPs)
	Information on Local Area Performance
Job Corps (WIOA Title 1-C)	Initial Assessment of Interests, Skill Levels & Supportive Service Needs
Job Fair Screening	Initial RESEA
Job Referral Placement Assistance	Intake and Orientation
Job Requirements information	Integrated Education and Training Programs
Job Search Assistance Keytrain Workshop	Job Corps (WIQA Title 1-C)
Labor Market Information	Job Development
Mock Interview	Job Fair Screening Job ReferralPlacement Assistance
National Farmworker Job Program (NFJP) Native American Programs	Job Requirements Information
	Job Search Assistance
Online Interview Preparation	Keytrain Workshop
Online RES Assessment Self-Service	
Online RES Unertation Set Service Online Set Service and Informational Activities	National Farmworker Job Program (NFJP)
Online Workshop - Interviewing	Native American Programs
Online Workshop - Job Searching with rechnology Online Workshop - Networking	Needs Related Payment
Online Workshop - Resume & Job Application	Online Interview Preparation Online RES Assessment Self-Service
Other Non WIQA Program	Online RES Orientation Self-Service
Other Support Service Assistance	Online Self-Services and Informational Activities Online Workshop - Interviewing
Out of Area and Search Association	Online Workshop - Job Searching with Technology
Out of Area Relocation Assistance Reentry Employment Opportunities (Adult)	Online Workshop - Networking Online Workshop - Resume & Job Application
Referral	Online Workshop - Your Workplace Skills
Referral to Employer Referral to Online Job Boards	Other Non WIOA Program Other Support Service Assistance
Referral to Training	Out of Area Job Search Assistance
Resume Development for Individual with Barriers	Out of Area Relocation Assistance
RTAA	Reentry Employment Opportunities (Adult) Referrat
Résumé Development Short-term Pre-vocational Services	Referral to Employer
University of the State of the	Referral to Online Job Boards Referral to Training
son axis Assessment Staff Arranged Interview with Employer	Resume Development for Individual with Barriers
Subsequent RESEA	
TANE Non-WICA	Résumé Development
Testing-Typing	Short-term Pre-vocational Services
Title V (Title V of the Older Americans Act) Transnortation Assistance	Soft Skills Assessment
	Staff Arranged Interview with Employer
Unemployment Insurance (UI) Claim Assistance	Subsequent RESEA
Unemployment Insurance Info	TANF Non-WICA
Veteran Priority of Service	Title V (Title V of the Older Americans Act)
Vocational Rehabilitation W-2	Transportation Assistance
Work Experience	UI Eligibility Review
Workforce Preparation	Unemployment Insurance (UI) Claim Assistance
WorkKeys-Applied Math	Unemployment Insurance Info
WorkKeys-Applied Technology Assessment	Vocational Rehabilitation
WorkKeys-Fit Assessment	W-2 Work Experience
WorkKeys-Graphic Literacy	Workforce Preparation
WorkKeys-Workplace Documents	
WorkKeys-Workplace Observation Assessment	VottC YouthBuild
YounBuild	
	ASSET Tachnical Rullatine Loh Cantar Disactory

ASSET Technical Bulletin – Find this document at: <u>https://dwd.wisconsin.gov/DETAPPS/detapps_info/secure/asset/tech-bulletins.htm</u>

- For Title 1 Youth according to the 10.4.1 policy there is an order of Services Eligibility determination, Objective assessment and Individual Service Strategy services need to be added/completed before adding any other new service. We have added the following functionality to better follow this policy.
 - No other services other than the above mentioned can be Completed with Actual start and end dates until the 3 are completed.

	1 Customer Search / Customer	Details / Services Summary / Service Detail	s	
Customer	Service Detaile			
Case Team	Service Details			
Documents				
Job Seeker		Save		Delete
Employment				
Assessments				
Employability Plan			Event History	
Services	 Eligibility Determination, Individual 	Service Strategy and Objective Assessment S	ervices must be completed before the Actual Open date can be	e saved.
Services (New)	Eligibility Determination, Individual	Service Strategy and Objective Assessment S	ervices must be completed before the Actual Close date can b	e saved.
Followups	•			
Customer Notes	Program Name:	Title 1		
Job Matching	Program Area:	Youth		
Customer Reports				
Financials	Service Information			
CEPT -	Service Name:	Adult Basic Educ	ation (co-enrolled in Youth Program)	
Staff Requests (3)	Service Category:	Partner Program	Participation	
Referrals	Participation Causing:	No		
RES Re-Employment Plan	* Open: (One of the following is requ	ired)		
	Planned Service Date:	[mm/dd/yyyy] Set As To	day	
	! Actual Service Date: 0	4/18/2024 [mm/dd/yyyy] Set As To	day	
	* Close: (One of the following is requ	uired)		
	Planned Service Date:	[mm/dd/yyyy] Set As To	day	
	! Actual Service Date:	4/18/2024 [mm/dd/yyyy] Set As To	day	

- For Title 1 Adult and Dislocated Worker according to the 8.3.1 policy, Eligibility Determination, Initial Assessment, Comprehensive Assessment, IEP Development Services need to be added/completed before adding any other new service. We have added the following functionality to better follow this policy.
 - No other Services other than the above mentioned can be Completed with Actual start and end dates until the 4 are completed.

	•		
Customer	Comilao Dataila		
Case Team	Service Details		
Documents			
Job Seeker	Save		Delete
Employment			
Assessments			
Employability Plan		Event History	
Programs			
Services			
Services (New)	Eligibility Determination, Comprehensive Assessmer	nt, Initial Assessment and IEP Initial Development Services must be completed bef	ore the Actual Open date can be saved.
Exits			
Follow-ups	Program Name:	Title 1	
Customer Notes	Program Area:	Adult	
Job Matching			
Customer Reports -	Service Information		
Financials	Service Name:	Career Planning	
CEPT -	Service Category:	Individualized Career Services	
Staff Requests (1)	Participation Causing:	Yes	
Referrals	* Open: (Ope of the following is required)		
RES Re-Employment Plan	Open. (One of the following is required)		
	Planned Service Date:	[mm/dd/yyyy] Set As Today	
	Actual Service Date: 08/22/2023	[mm/dd/yyyy] Set As Today	
	$!^{\ast}\;$ Close: (One of the following is required)		

New Pages we can add Customer notes from

- Customer note will be automatically generated from the Employment tab on ASSET whenever a new Employment record is added. If editing an older record, there will be a checkbox on the bottom which can create a new Customer Note if needed. The following fields will be Captured in the Customer Note
 - Note Date: today's date
 - Note summary: Employment Summary name of employer
 - *Content*:
 - Name of employer
 - o City
 - o State
 - o Job Title
 - o Career Progression
 - o Pay
 - o Rate
 - o Start Date
 - Created by: user handle and timestamp of record creator.
 - This is a system generated note.

Home Manage Customers - Staff - Posting Tools -	Admin Tool+ RES Tools- System Reports- BI Reports Manage Financials- Referrats
Customer Case Team Documents Job Seeker Employment	 Customer Search / Customer Details / Employment Burnmary / Employment Details Employment Details Save Delete Event History
Assessments Employability Plan Programs Services (New) Exits Follow-ups Colustomer Koles Job Matching Calsmore Koles Financials CEPT	Employment History Information: * Employment History Information: * Employment K for Incurbent Worker Program? Yes No Response * Employer Name: CECO ferm Employer Address Line 1: sdd5s Employer Address Line 1: sdd5s Employer Address Line 2: sdd5s Employer CDy: sdd5s Employer State: Y Employer ZQ: sesses aread] Employer Phone Number: justers aread] Extension:
Statf Requests (1) Roterrals RES Ro-Employment Plan	Job Tite: Managers, A& Other Occupational Category: O'NET Code: O'NET Code: I1-3192:00]##-#### #] Link to O'NET Soybean Farming Solect NAUCS Link to NAUCS Career Progression:
	Pay: 3 Rate: V Other: V Stata Date: Immiddlyyygi End Date: Immiddlyyygi * Reason for Leaving: Immiddlyyygi * Is this employer a federal contractor? Ves # No O No Response
	Is this job a flooral job? Ves # No No Response Is the at emportal job (less than or equal to 30 days)? Ves # No No Response Estimated number of hours per week: UI Wage Data
	Create Customer Note:
	* Career Planner: Shartika Change Staff Ernat Staff Type * Office Coder: 0916-Cance County Job Center WCA: 016-Seath Central Created: Bis1/2023 16:36:06 AM By ACCOUNTS:SHETTSXRXF
	Last Uptaled: 3/4/2024 12:21:51 PM By: ACCOUNTEISHETTESKKXF Save Delete Event History

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- Customer Notes will automatically be created when a customer is registered with Title 3 JVSG or Title 3 Wagner-Peyser program in ASSET. This feature is only for when we are manually adding these in ASSET. The Notes would include the following data:
 - Note date = todays date
 Summary = JVSG enrollment
 Contents = The customer was registered with JVSG. + Display that this is a system-generated note

OR

Note date = todays date
 Summary = Wagner-Peyser registrant
 Contents = The customer was registered with Wagner-Peyser. + This is a system generated note.

Customer Note		SAVE DELETE
Details		^ .
Note Date* 12/28/2023	Summary* JVSG Enrollment	
Comments* The customer was registered with JVSG. ***This is a system-generated note.***		
Programs Title 3		78 / 2000
Share with UI Mark as Confidential None Selected		
Staff Information		1~
Career Planner* • Staff Type •	Office Code* WDA 0810-Dane County Job Center * 010-S	outh Central
Created By: Kulkarni, Deepa 12/28/2023 6:55:59 PM	Last Updated By: Kulkarni, Deepa 2/5/2024 11:20:12 AM	

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Appendix: Directions on using new technology - New technology was used to make the search results grids that are deployed through this project. The new search results grids will be added to other ASSET pages as they get re-developed over time. The following are directions on how to use this new technology. These directions can be used for any page on which this technology is used.

Searching - to look for certain keywords, numbers or dates within a group of records

 To search, type your keywords/numbers into the "search" field in the upper right hand corner of the grid. The results that you see below the search field will update as you type, so you do not need to hit "enter" on your keyboard to execute the search.

Customer Note Summary										⊕ ₽	:
					Q Search						
Note Id	\mathbb{Y}	Note Date	\mathbb{Y}	Note Summary		Y	Confidential	7	User Name	Y	
11830		04/08/2024		Service - Referral to Certified Pr	e-Apprenticeship Program				Shetty, Sarvika		1ª
11694		04/02/2024		Service - Recruitment Events					Shetty, Sarvika		<i>I</i> [*]
11716		04/02/2024		Service - Eligibility Determination	n				Shetty, Sarvika		ľ

Filtering – to narrow the group of records you're viewing to those that match certain parameters

- Each column in the results grid can be filtered to a specific status, name, date, keyword, etc.
- Depending on the kind of data, the filtering options will vary. Columns like names will provide users different filtering options than columns with dates.
- One way to filter a certain column is to click the "filter" icon that looks like a funnel, which is always present next to each column name. In the example below this shows how it looks to filter the Customer PIN column to values that equal number '123456.'
 - The red box shows the funnel icon next to the column name, which opens this dialog box when selected.
 - The yellow box shows what the user wants ASSET to do with the data it enters in the green box (ex: ignore everything with this value, show me everything greater than this value, etc.)
 - The green box shows the PIN the user manually typed.
 - Click on the filter icon again or click elsewhere in the grid to make the dialog box disappear.

nfidential	Y	User Name	7
contains			•
Sarvika			
		CLEAR	FILTER
		опещу, загика	

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- Another way to filter is to click this vertical ellipses icon, visible when hovering with your mouse on or next to the "filter" funnel icon above. Selecting the word "Filter" will then bring up the same dialog box that allows the user to enter their filter parameters.
 - \circ $\;$ The red box shows the vertical ellipses icon.
 - The yellow box shows the word "Filter" that will bring up the dialog box.
 - Click on the vertical ellipses again or click elsewhere in the grid to make the dialog box disappear.



Sorting/Ordering - to take the results you see and arrange them A-Z or largest to smallest

- When you hover your mouse on or near the filter icon next to a column name, the sort icon will automatically appear to the left of the filter icon.
 - \circ $\;$ The sort icon is in red below.



- Clicking the sort icon once will order the results that you see alphabetically or numerically. Clicking the sort icon again will reverse the sort order.
- To un-sort a column, hover your mouse on or near the filter icon and click on the vertical ellipses. This opens a dialog box. Select "Unsort" and your column will revert to its default sorting.
 - The red box shows the vertical ellipses icon.
 - The yellow box shows the "Unsort" action.
 - Click on the vertical ellipses again to make the dialog box disappear.



Exporting - to take the results you see on the screen and download them as a file

- Every new grid allows the user to download the results as an excel file.
- The results in your excel file will represent however you've searched, sorted or filtered the results in ASSET.
- After you have narrowed your results to the records you want, click this icon to export your results.

Custome	er Note	Summary								⊕ <mark>⊉</mark> :
					Q Search					Export
Note Id	\forall	Note Date	\forall	Note Summary		Ŷ	Confidential	\forall	User Name	Ŷ
										.8

Other features

- Selecting the vertical ellipses in the upper right hand corner of the grid will give users a menu with additional options.
 - The red box shows the vertical ellipses.
 - The yellow box shows the additional options the user sees after selecting the ellipses.
 - The user can click the vertical ellipses a second time or click elsewhere in the grid to collapse these additional options.

WIOA Program(s)

itle 3 Regi 09/2	Registration Date: 09/26/2023			Participation Date:			Staff:					R	Clear All Filters	•		
Service Name	Y	Area	Y	Fund	7	Open Date	7	Close Date	Y	Office	Y	Staff Id	Y		Show/Hide Columns	
Online RES Orientation Self-Service		Т3		RESEA		12/26/2023		12/26/2023		0810				No		1ª
Online RES Assessment Self-Servic	;	Т3		RESEA		12/26/2023		12/26/2023		0810				No		1

- The additional options given above are:
 - To clear all the filters the user has applied.
 - To show or hide columns. This can be used to hide a column that isn't needed for your purposes, or show any columns you've previously hidden.
 - Certain grids have pre-defined filters that allow users to easily view a different subset of data.
- The bottom right-hand corner of the grid allows users to choose to see more rows on the page, move to the next page or jump to the first or last page.

Rows per page:	10	1-10 of 86	<	<	>	Ж
	25					
	50					
	100					

 As the new technology is implemented in ASSET, there will be a mix of old and new technology on the pages. One of the results of this is that there will often be two scroll bars on pages with these new grids. One scroll bar allows you to scroll within the page itself, while the other allows you to scroll within

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the grid. Once the new technology is implemented throughout the application, users will again have one consistent scroll bar.

- $\circ~$ The rex box shows the scroll bar on the page. Use this scroll bar to move to the top or bottom of the page.
- \circ The yellow box shows the scroll bar within the grid. Use this scroll bar to see all the rows of data.

