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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 participation-causing 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.

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

The screenshot displays the 'Customer Note Summary' page in the ASSET system. The page features a dark blue header with navigation links: Home, Manage Customers, Staff, Posting Tools, Admin Tool, RES Tools, System Reports, BI Reports, Manage Financials, and Referrals. A left sidebar lists various menu items, with 'Customer Notes' highlighted. The main content area shows a table of customer notes. The table has columns for Note Id, Note Date, Note Summary, Confidential, and User Name. Each row includes an edit icon. At the bottom right of the table, there is a 'Rows per page' dropdown set to 10 and a pagination indicator showing '1-10 of 11'.

Note Id	Note Date	Note Summary	Confidential	User Name
11830	04/08/2024	Service - Referral to Certified Pre-Apprenticeship Program		Shetty, Sarvika
11694	04/02/2024	Service - Recruitment Events		Shetty, Sarvika
11716	04/02/2024	Service - Eligibility Determination		Shetty, Sarvika
11715	04/02/2024	Service - Eligibility Determination		Shetty, Sarvika
11714	04/02/2024	Service - Incumbent Worker Training	🔒	Shetty, Sarvika
11690	04/02/2024	Test		Shetty, Sarvika
11238	03/14/2024	Service - Job Readiness Training	🔒	Shetty, Sarvika
11145	03/12/2024	Service - Work Experience		Shetty, Sarvika
11142	03/12/2024	DOC Re-Entry program created		Shetty, Sarvika
11143	03/12/2024	Orientation service added		Shetty, Sarvika

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

Customer Note Summary						
Note Id	Note Date	Note Summary	Confidential	User Name		
11830	04/08/2024	Service - Referral to Certified Pre-Apprenticeship Program		Shetty, Sarvika		
11694	04/02/2024	Service - Recruitment Events		Shetty, Sarvika		

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

Customer Note Summary						
Note Id	Note Date	Note Summary	Confidential	User Name		
11830	04/08/2024	Service - Referral to Certified Pre-Apprenticeship Program		Shetty, Sarvika		
11694	04/02/2024	Service - Recruitment Events		Shetty, Sarvika		

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
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Customer
- Case Team
- Documents
- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports
- Financials
- CEPT
- Staff Requests
- Referrals
- RES - Employment Plan

Customer Note
 SAVE DELETE

Details ^

Note Date*
4/12/2024

Summary*

Comments*

0 / 2000

Programs

Share with UI
 Mark as Confidential
 None Selected

Direct Participant Contact

Staff Information edit ^

Career Planner*
Shetty, Sarvika

Staff Type

Office Code*
0810-Dane County Job Center

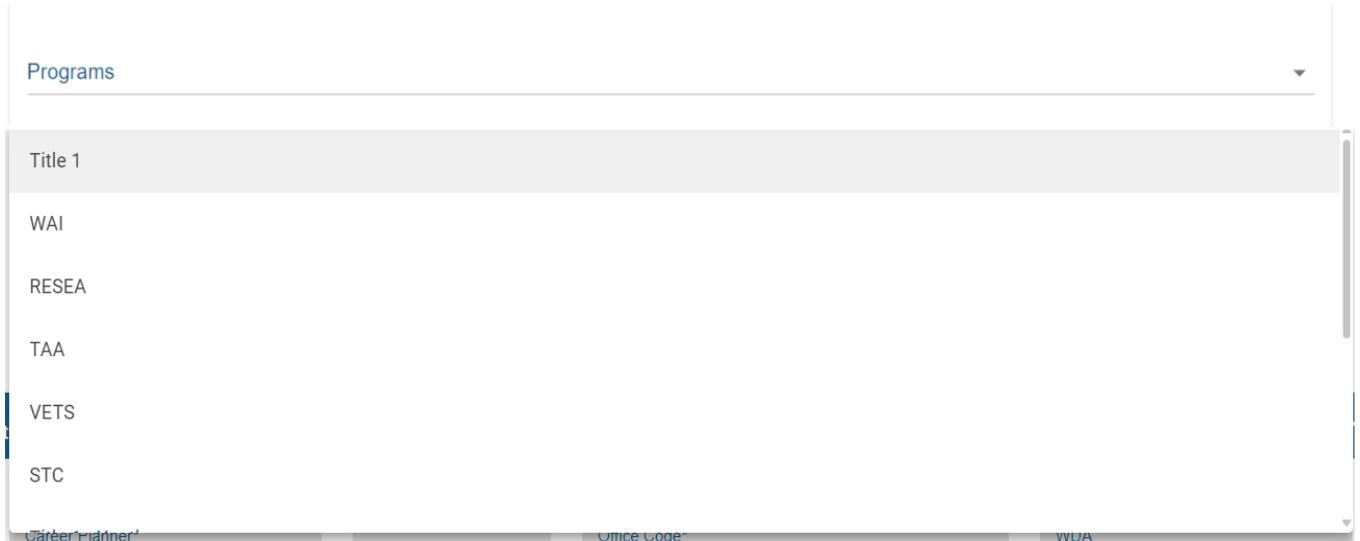
WDA
010-South Central

Created By: _____ Last Updated By: _____

Event History v

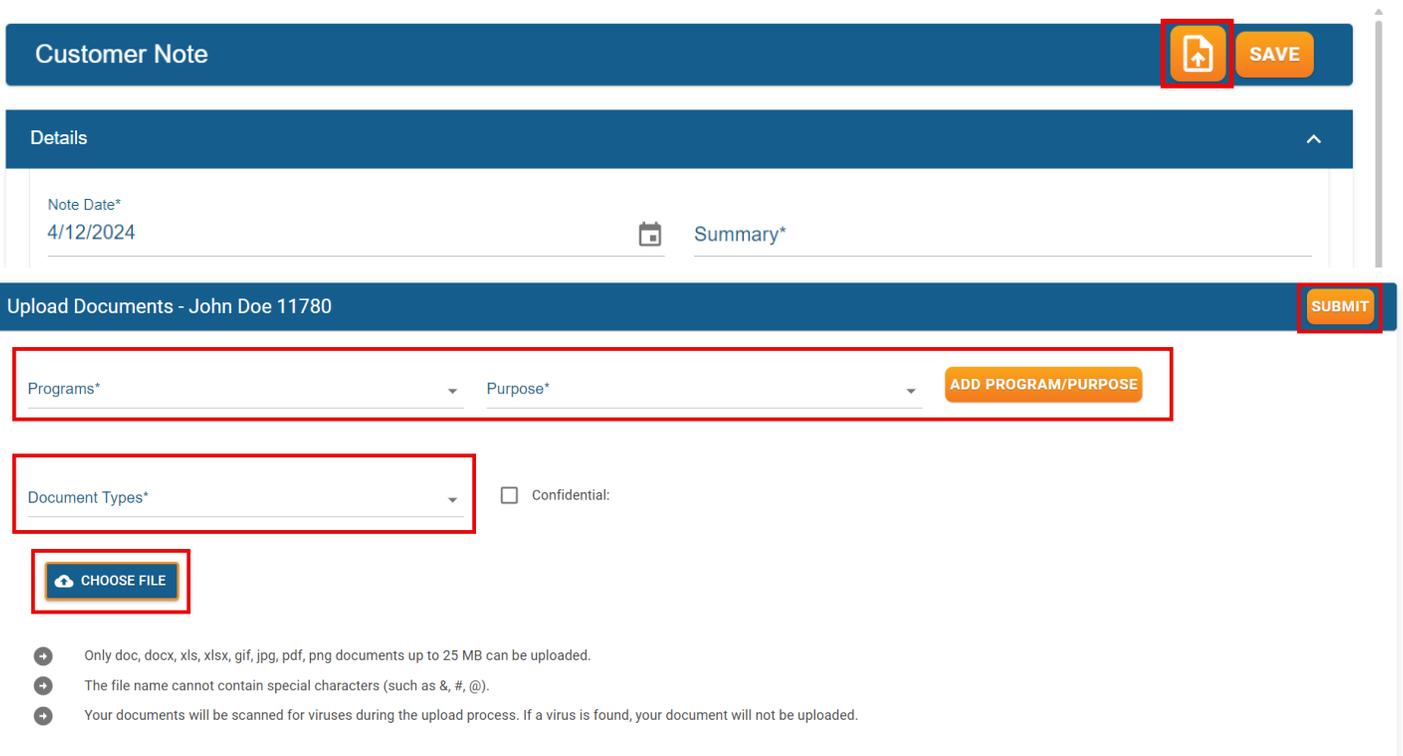
SAVE DELETE

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



The screenshot shows a dropdown menu titled "Programs" with a downward arrow on the right. The menu is open, displaying a list of options: "Title 1", "WAI", "RESEA", "TAA", "VETS", and "STC". The "VETS" option is currently selected, indicated by a blue highlight and a vertical bar on the left side of the menu.

- 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



The screenshot displays two sections of a web application. The top section, titled "Customer Note", features a blue header bar with a document upload icon (a white document with an upward arrow) and a "SAVE" button. Below this is a "Details" section with a blue header and an upward arrow. The details include a "Note Date*" field with the value "4/12/2024" and a "Summary*" field with a calendar icon.

The bottom section, titled "Upload Documents - John Doe 11780", has a blue header bar with a "SUBMIT" button. The main content area contains several fields and buttons:

- A "Programs*" dropdown menu and a "Purpose*" dropdown menu, both highlighted with a red border. To their right is an "ADD PROGRAM/PURPOSE" button.
- A "Document Types*" dropdown menu, also highlighted with a red border.
- A "CHOOSE FILE" button with a document icon, highlighted with a red border.
- A "Confidential:" checkbox.
- Three informational bullet points:
 - 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

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports -
- Financials
- CEPT -
- Staff Requests
- Referrals
- RES Re-Employment Plan

WIOA Program(s)

Title 3	Registration Date: 09/26/2023	Participation Date:	Staff:	+ ⋮ ▾
Support to Communities	Registration Date: 03/12/2024	Participation Date: 03/14/2024	Staff: Shetty, Sarvika	+ ⋮ ▾

Non-WIOA Program(s)

SAE 2020 Grant for Apprenticeship	Registration Date: 03/13/2024	Staff: Shetty, Sarvika	+ ⋮ ▾
Apprenticeship Pipeline	Registration Date: 03/13/2024	Staff: Shetty, Sarvika	+ ⋮ ▾
H-1B Rural Healthcare Grant - COW	Registration Date: 03/12/2024	Staff: Shetty, Sarvika	+ ⋮ ▾
Summer Youth	Registration Date: 03/12/2024	Staff: Shetty, Sarvika	+ ⋮ ▾
DOC Re-Entry	Registration Date: 03/12/2024	Staff: Shetty, Sarvika	+ ⋮ ▾

History - Closed Non-WIOA Program(s)

Worker Advancement Initiative (WAI)	Registration Date: 03/13/2024	Exit Date: 04/10/2024	Staff: Shetty, Sarvika	⋮ ▾
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WIOA Program(s)

Title 3	Registration Date: 09/26/2023	Participation Date:	Staff:	+ ⋮ ^
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Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing	
Online RES Orientation Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No	✎
Online RES Assessment Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No	✎
Online Self-Services and Informational Activities	T3	JCW	09/26/2023	09/26/2023	0810		No	✎

Support to Communities	Registration Date: 03/12/2024	Participation Date: 03/14/2024	Staff: Shetty, Sarvika	+ ⋮ ▾
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- New Services can be added with the + Icon on every program accordion:

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports - Financials
- CEPT - Staff Requests
- Referrals
- RES Re-Employment Plan

WIOA Program(s)

Title 3		Registration Date:	Participation Date:	Staff:			
		09/26/2023					
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Online RES Orientation Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online RES Assessment Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online Self-Services and Informational Activities	T3	JCW	09/26/2023	09/26/2023	0810		No

Support to Communities		Registration Date:	Participation Date:	Staff:			
		03/12/2024	03/14/2024	Shetty, Sarvika			
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Initial Assessment of Interests, Skill Levels & Supportive Service Needs	STC	STC	03/14/2024	03/14/2024	0810	Shetty, Sarvika	Yes

Non-WIOA Program(s)

SAE 2020 Grant for Apprenticeship		Registration Date:	Staff:		
		03/13/2024	Shetty, Sarvika		
Service Name	Fund	Open Date	Close Date	Office	Staff Id
Eligibility Determination	SAE 2020	04/02/2024	04/02/2024	0810	Shetty, Sarvika

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

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports - Financials
- CEPT - Staff Requests
- Referrals
- RES Re-Employment Plan

WIOA Program(s)

Title 3		Registration Date:	Participation Date:	Staff:			
		09/26/2023					
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Online RES Orientation Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online RES Assessment Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online Self-Services and Informational Activities	T3	JCW	09/26/2023	09/26/2023	0810		No

Support to Communities		Registration Date:	Participation Date:	Staff:			
		03/12/2024	03/14/2024	Shetty, Sarvika			
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Initial Assessment of Interests, Skill Levels & Supportive Service Needs	STC	STC	03/14/2024	03/14/2024	0810	Shetty, Sarvika	Yes

Non-WIOA Program(s)

SAE 2020 Grant for Apprenticeship		Registration Date:	Staff:		
		03/13/2024	Shetty, Sarvika		
Service Name	Fund	Open Date	Close Date	Office	Staff Id
Eligibility Determination	SAE 2020	04/02/2024	04/02/2024	0810	Shetty, Sarvika

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

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports - Financials
- CEPT - Staff Requests
- Referrals
- RES Re-Employment Plan

WIOA Program(s)

Title 3		Registration Date:	Participation Date:	Staff:			
		09/26/2023					
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Online RES Orientation Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online RES Assessment Self-Service	T3	RESEA	12/26/2023	12/26/2023	0810		No
Online Self-Services and Informational Activities	T3	JCW	09/26/2023	09/26/2023	0810		No

Support to Communities		Registration Date:	Participation Date:	Staff:			
		03/12/2024	03/14/2024	Shetty, Sarvika			
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Initial Assessment of Interests, Skill Levels & Supportive Service Needs	STC	STC	03/14/2024	03/14/2024	0810	Shetty, Sarvika	Yes

Non-WIOA Program(s)

SAE 2020 Grant for Apprenticeship		Registration Date:	Staff:		
		03/13/2024	Shetty, Sarvika		
Service Name	Fund	Open Date	Close Date	Office	Staff Id
Eligibility Determination	SAE 2020	04/02/2024	04/02/2024	0810	Shetty, Sarvika

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

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports - Financials
- CEPT - Staff Requests (52)
- Referrals (23)
- RES Re-Employment Plan

WIOA Program(s)

Title 3 JVSG		Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:	
		11/23/2022	02/26/2024	12/28/2023		Kulkarni, Deepa	
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Career Planning	T3	JVSG	04/05/2024	04/05/2024	0810	Kulkarni, Deepa	Yes

Title 1 Dislocated Worker		Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:	
		12/08/2022		02/14/2023	02/14/2023	Kulkarni, Deepa	
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Housing Assistance	DW	WIODW	02/14/2023	02/14/2023	0810	Kulkarni, Deepa	No

Title 1 Adult		Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:	
		12/08/2022		12/08/2022		Kulkarni, Deepa	
Service Name	Area	Fund	Open Date	Close Date	Office	Staff Id	Participation Causing
Apprenticeship Training	AD	WIOAD	N/A		0810	Kulkarni, Deepa	Yes
Childcare Assistance	AD	WSAO	N/A		0810	Kulkarni, Deepa	No
Adult Education and Literacy	AD	OTH	N/A		0810	Kulkarni, Deepa	Yes

- 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.

- Customer
- Case Team
- Documents
- Job Seeker
- Employment
- Assessments
- Employability Plan
- Programs
- Services
- Services (New)
- Exits
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports - Financials
- CEPT - Staff Requests (13)
- Referrals
- RES Re-Employment Plan

WIOA Program(s)

Title 3 JVSG	Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:
	07/25/2023	03/01/2024	01/02/2024		Kulkarni, Deepa
Title 1 Dislocated Worker	Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:
	11/10/2020	01/24/2021	01/06/2021		Scales, Alison
Title 1 Adult	Registration Date:	Participation Date:	Begin Date:	End Date:	Staff:
	11/10/2020	01/24/2021	11/10/2020		Powell, Rebecca
Title 3	Registration Date:	Participation Date:	Staff:		
	07/25/2023	03/01/2024	Amin, Sanyukta		
TAA	Registration Date:	Participation Date:	Staff:		
	11/04/2021	12/06/2021	Borra, Sahithya		
Support to Communities	Registration Date:	Participation Date:	Staff:		
	08/01/2023		Scales, Alison		

History - Closed WIOA Program(s)

Title 3	Registration Date:	Participation Date:	Exit Date:	Staff:
	08/16/2017		04/06/2020	
Title 3	Registration Date:	Participation Date:	Exit Date:	Staff:
	09/29/2015		04/08/2016	
Title 3	Registration Date:	Participation Date:	Exit Date:	Staff:
	08/04/2008		08/04/2008	

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 .

36170 0 Notification(s)

Home Manage Customers - Staff - Posting Tools - RES Tools - System Reports - BI Reports Manage Financials - Referrals

Customer
Case Team
Documents
Job Seeker
Employment
Assessments
Employability Plan
Programs
Services (Old)
Services
Exits
Follow-ups
Customer Notes
Job Matching
Customer Reports -
Financials
CEPT -
Staff Requests
Referrals
RES Re-Employment Plan

WIOA Program(s)

Title 1 Adult/Dislocated Worker Registration: 5/20/2024

Program Participation

No Participation found for the Title 1 Adult/Dislocated Worker Title 1 Program.

Title 1 Adult Registration: 05/20/2024 Participation: Begin: 05/20/2024 End: Staff: Shetty, Sarvika

Service Name	Area	Fund	Open	Close	Office	Staff	Participation Causing
Child Care	AD	OTH			0810	Shetty, Sarvika	No
Community Service Block Grant	AD	OTH	N/A		0810	Shetty, Sarvika	No

Title 1 Dislocated Worker Registration: 05/20/2024 Participation: Begin: 05/20/2024 End: Staff: Shetty, Sarvika

Service Name	Area	Fund	Open	Close	Office	Staff	Participation Causing
Apprenticeship Training	DW	WIODW			0810	Shetty, Sarvika	Yes
Needs Related Payment	DW	WSAO	N/A		0810	Shetty, Sarvika	No

Title 3 Registration: 09/26/2023 Participation: 05/24/2024 Staff: Shetty, Sarvika

Customer
Case Team
Documents
Job Seeker
Employment
Assessments
Employability Plan
Programs
Services (Old)
Services
Exits
Follow-ups
Customer Notes
Job Matching
Customer Reports -
Financials
CEPT -
Staff Requests (12)
Referrals
RES Re-Employment Plan

WIOA Program(s)

Title 1 Adult/Dislocated Worker Registration: 11/10/2020

Program Participation

Participation Group	Participation
DWG	3/5/2021
RRG	3/7/2024
Title 1	1/24/2021
Title 1 Adult	1/24/2021
Title 1 Dislocated Worker	1/2/2024

Title 1 Adult Registration: 11/10/2020 Participation: 01/24/2021 Begin: 11/10/2020 End: Staff: Powell, Rebecca

Service Name	Area	Fund	Open	Close	Office	Staff	Participation Causing
Comprehensive Individualized or Specialized Assessment	AD	WSAO	04/02/2024	04/02/2024	0810	Shetty, Sarvika	Yes
Eligibility Determination	AD	OTH	03/07/2024	03/07/2024	0810	Shetty, Sarvika	No
Apprenticeship Training	AD	OTH	01/04/2024	01/04/2024	0810	Kulkarni, Deepa	Yes
English Language Instruction	AD	OTH	01/02/2024		0810	Kulkarni, Deepa	Yes

Service Detail Page

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

Customer Search / Customer Details / Services Summary / Service Details

Service Details

Save Delete

Event History

Program Name: Title 3 - JVSG

Service Information

Service Name: Individual Employment Counseling

Service Category: Individualized Career Services

Participation Causing: Yes

* Open: (One of the following is required)

Planned Service Date: 03/07/2024 [mm/dd/yyyy] Set As Today

Actual Service Date: 03/07/2024 [mm/dd/yyyy] Set As Today

* Close: (One of the following is required)

Planned Service Date: 03/07/2024 [mm/dd/yyyy] Set As Today

Actual Service Date: 03/07/2024 [mm/dd/yyyy] Set As Today

* Funding Source: JVSG

- 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\scalecacymj/Scales, Alison. This is a system-generated note.
 - *Note - In the By section Display **Date and Time***

Customer Search Customer Details Services Summary Service Details

Service Details

Save Delete

Print History

Program Name: Support to Communities

Service Information

Service Name: Initial Assessment of Interests, Skill Levels & Supportive Service Needs
 Service Category: Basic Career - Staff Assisted
 Participation Causing: Yes

* Open: (One of the following is required)

Planned Service Date: 04/15/2024 (mm/dd/yyyy) Set As Today
 Actual Service Date: 04/15/2024 (mm/dd/yyyy) Set As Today

* Close: (One of the following is required)

Planned Service Date: 04/15/2024 (mm/dd/yyyy) Set As Today
 Actual Service Date: 04/15/2024 (mm/dd/yyyy) Set As Today

* Funding Source:
 Grant Identifier:

* Qualifying Employer: Test Employer

* Contract ID: 10-0007

Old Contract ID:

* List Assessment(s) and Assessment Provider(s):

Provider Name:
 Location of Service Provision:

Comments: Cautious: 500 character limit

Completion Code:

Create Customer Note: Yes

* Career Planner: Shelly, Sarvika Email
 Staff Type:
 * Office Code: 0810-Career County Job Center
 WDA: 010-South Central

Created: By:
 Last Updated: By:

Save Delete

Print 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.

- Services (New)
- Alerts
- Follow-ups
- Customer Notes
- Job Matching
- Customer Reports
- Financials
- EPT
- Staff Requests (14)
- Referrals
- ES Re-Employment Plan

ITA Established: Yes No No Response

* ITA Number:

* ITA Program ID: **Select an ITA Program ID**

ITA Program Name:

ITA Program Provider:

ITA Program Location:

Course: **Add Course**

* ITA Program Outcome:

* ITA Employment Outcome:

ITA Outcome Comment:

caution 1000 character limit

ASSET - ITA Program Lookup

Select **Version 2** (Current ETPL Website) for all occupational classroom services with a planned or actual start date on or after 12/02/2019.

Only select **Version 1** (Old ITA Website) for occupational classroom services that were planned or actually started before 12/01/2019.

* ITA Version:

ITA Established: No No Response

Select an ITA Program ID

Add Course

caution 1000 character limit

ASSET - ITA Program Lookup

Select **Version 2** (Current ETPL Website) for all occupational classroom services with a planned or actual start date on or after 12/02/2019.

Only select **Version 1** (Old ITA Website) for occupational classroom services that were planned or actually started before 12/01/2019.

* ITA Version: Unpublished

Training Provider:

ITA Program ID: **Search**

Program ID	Provider Name	Program Location	Program Name	
00172_00001	University of Wisconsin Green Bay	Online	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 data	Detailed Info

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

Service Details

Save

Delete

Event History

Program Name: TAA
Petition Number: 038094
Service Information
Service Name: Apprenticeship Training
Service Category: Training Services

* Open: (One of the following is required)

Planned Service Date: [mm/dd/yyyy]

Actual Service Date: [mm/dd/yyyy]

* Close: (One of the following is required)

Planned Service Date: [mm/dd/yyyy]

Actual Service Date: [mm/dd/yyyy]

* Funding Source:

TAA
Pell or other financial aid
Other Non-WIA
Other
DVR

Contract ID:

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.

The screenshot displays two side-by-side views of the 'Service Eligibility' page. The left view, labeled 'OLD' in orange, shows a comprehensive list of services under the heading 'Service Eligibility Program Information - Title 3'. The right view, labeled 'NEW' in green, shows a shorter list of services under the same heading. The 'NEW' list includes services such as Job Corps (WIOA Title 1-C), Reentry Employment Opportunities (Adult), and RETAA, which were previously listed in the 'OLD' view. The bottom of the page features the ASSET Technical Bulletin and Job Center Directory logos.

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

- 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.

Customer Search / Customer Details / Services Summary / Service Details

Service Details

Save Delete

Event History

• Eligibility Determination, Individual Service Strategy and Objective Assessment Services must be completed before the Actual Open date can be saved.
 • Eligibility Determination, Individual Service Strategy and Objective Assessment Services must be completed before the Actual Close date can be saved.

Program Name: Title 1
Program Area: Youth

Service Information
Service Name: Adult Basic Education (co-enrolled in Youth Program)
Service Category: Partner Program Participation
Participation Causing: No

* **Open: (One of the following is required)**

Planned Service Date: [mm/dd/yyyy] **Set As Today**

! Actual Service Date: [mm/dd/yyyy] **Set As Today**

* **Close: (One of the following is required)**

Planned Service Date: [mm/dd/yyyy] **Set As Today**

! Actual Service Date: [mm/dd/yyyy] **Set As Today**

- 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 Search / Customer Details / Services Summary / Service Details

Service Details

Save Delete

Event History

• Eligibility Determination, Comprehensive Assessment, Initial Assessment and IEP Initial Development Services must be completed before the Actual Open date can be saved.

Program Name: Title 1
Program Area: Adult

Service Information
Service Name: Career Planning
Service Category: Individualized Career Services
Participation Causing: Yes

* **Open: (One of the following is required)**

Planned Service Date: [mm/dd/yyyy] **Set As Today**

! Actual Service Date: [mm/dd/yyyy] **Set As Today**

! * **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
 - City
 - State
 - Job Title
 - Career Progression
 - Pay
 - Rate
 - Start Date
 - Created by: user handle and timestamp of record creator.
 - This is a system generated note.

The screenshot displays the 'Employment Details' page in the ASSET system. The page is divided into a left sidebar with navigation options and a main content area. The main content area contains a form for entering employment details. A red box highlights the 'Create Customer Note' checkbox, which is checked. The form includes the following fields and options:

- Employment History Information:**
 - Employment is for Incumbent Worker Program? (Yes, No, No Response)
 - Employer Name: CEO farm
 - Employer Address Line 1: 10755
 - Employer Address Line 2: [empty]
 - Employer City: [empty]
 - Employer State: [dropdown]
 - Employer Zip: [empty]
 - Employer Phone Number: [empty]
 - Job Title: Managers, All Other
 - Occupational Category: [dropdown]
 - O*NET Code: 11-0199.00 [Link to O*NET]
 - NAICS: 111110 Soybean Farming [Select NAICS, Link to NAICS]
 - Career Progression: [dropdown]
 - Pay: \$ [empty]
 - Rate: [dropdown]
 - Other: [dropdown]
 - Start Date: [mm/dd/yyyy]
 - End Date: [mm/dd/yyyy]
 - Reason for Leaving: [dropdown]
 - Is this employer a federal contractor? (Yes, No, No Response)
 - Is this job a federal job? (Yes, No, No Response)
 - Is this a temporary job (less than or equal to 30 days)? (Yes, No, No Response)
 - Estimated number of hours per week: 50
- UI Wage Data:** No Wage Data found for Pin: 11780
- Create Customer Note:** Yes
- Staff Information:**
 - Career Planner: Shetty, Sarvika [Change Staff, Email]
 - Staff Type: [dropdown]
 - Office Code: 0810-Dane County Job Center
 - WDA: 010-South Central
 - Created: 8/31/2023 10:55:05 AM By: ACCOUNTS\SHETTXXRF
 - Last Updated: 3/4/2024 12:21:51 PM By: ACCOUNTS\SHETTXXRF

- 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* = today's date
 - Summary* = JVSG enrollment
 - Contents* = The customer was registered with JVSG. + Display that this is a system-generated note
- OR
 - *Note date* = today's 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* <div style="display: flex; align-items: center;"> JVSG Enrollment </div>
Comments* The customer was registered with JVSG. ***This is a system-generated note.***	
78 / 2000	
Programs Title 3	
<input type="radio"/> Share with UI <input type="radio"/> Mark as Confidential <input checked="" type="radio"/> None Selected	
<input checked="" type="checkbox"/> Direct Participant Contact	

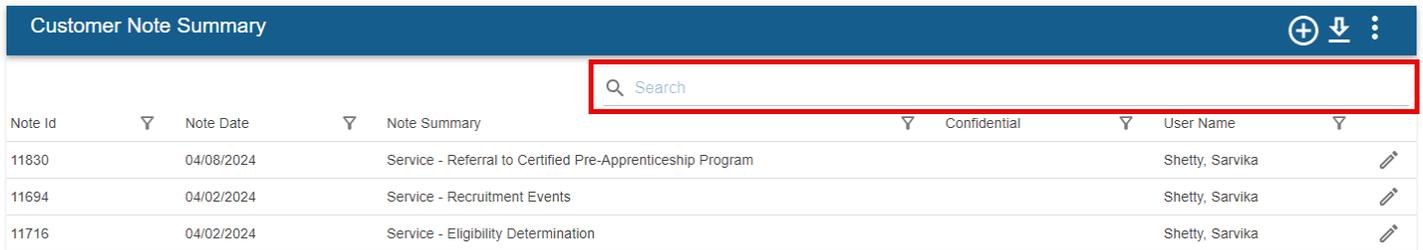
Staff Information ^

Career Planner* Kulkarni, Deepa	Staff Type	Office Code* 0810-Dane County Job Center	WDA 010-South Central
Created By: Kulkarni, Deepa 12/28/2023 6:55:59 PM		Last Updated By: Kulkarni, Deepa 2/5/2024 11:20:12 AM	

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.

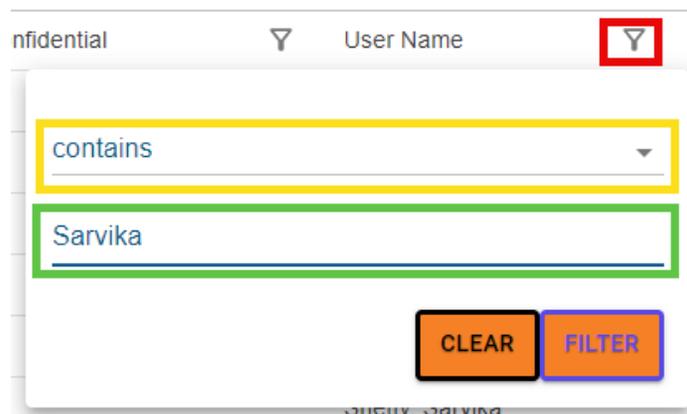


The screenshot shows a table with a dark blue header. The header contains the text 'Customer Note Summary' on the left and three icons (a plus sign, a downward arrow, and a vertical ellipsis) on the right. Below the header is a search bar with a magnifying glass icon and the text 'Search', which is highlighted with a red border. The table has several columns: 'Note Id', 'Note Date', 'Note Summary', 'Confidential', and 'User Name'. Each column has a small downward arrow icon next to its name. The table contains three rows of data.

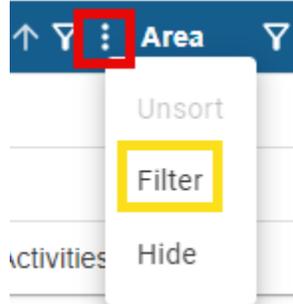
Note Id	Note Date	Note Summary	Confidential	User Name
11830	04/08/2024	Service - Referral to Certified Pre-Apprenticeship Program		Shetty, Sarvika
11694	04/02/2024	Service - Recruitment Events		Shetty, Sarvika
11716	04/02/2024	Service - Eligibility Determination		Shetty, Sarvika

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.



- 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.
 - 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.

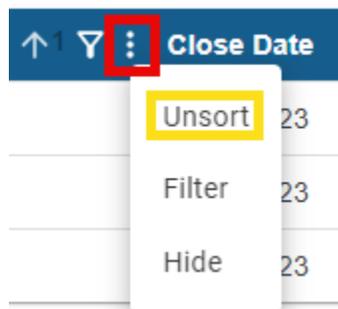


Sorting/Ordering – to take the results you see and arrange them A-Z or largest to smallest

- 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.
 - The sort icon is in red below.

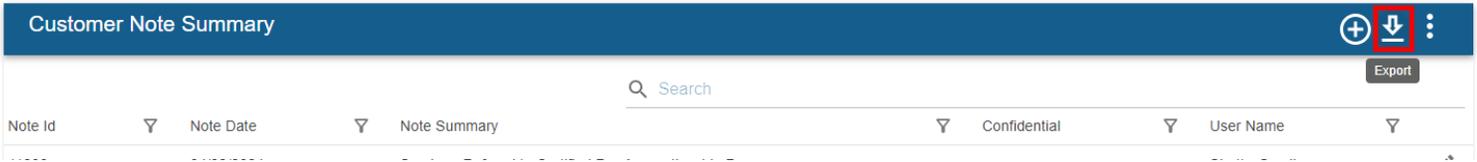


- Clicking the sort icon once will order the results that you see alphabetically or numerically. Clicking the sort icon again will reverse the sort order.
- To un-sort a column, hover your mouse on or near the filter icon and click on the vertical ellipses. This opens a dialog box. Select "Unsort" and 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.



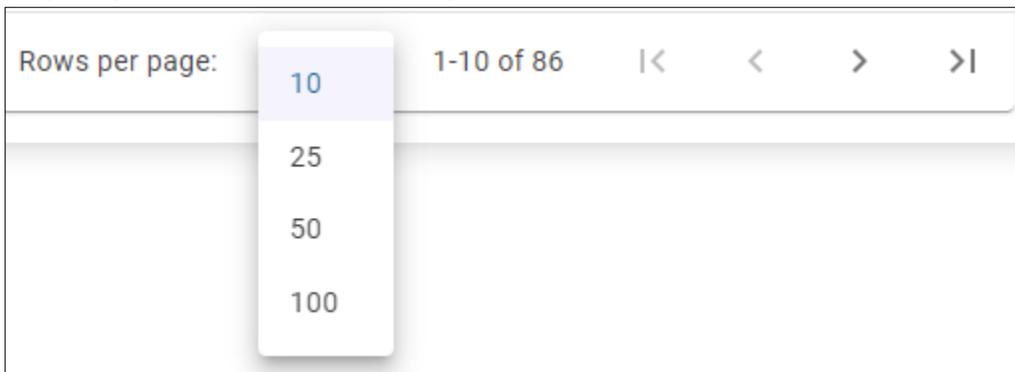
Other features

- 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)



- 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.



- 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

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

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

