Contents

Staff Request Optimization Project Changes – **Will be deployed on August 21, 2024**

Overview of changes

- Staff can create Staff Requests on the exact page where they notice the error.
- Staff have Dashboard tiles on their ASSET homepage that alert them to the status of their requests and anything that requires action on their part.
- There is a customer-level Staff Request menu item that shows you all the requests for that individual regardless of status.
- There is a new grid that allows staff enhanced searching to find a specific request.
- Staff can take case assignment for the customer as part of the workflow of processing the request.
- There are enhanced notifications and automated emails to help staff be aware of changes and required action.

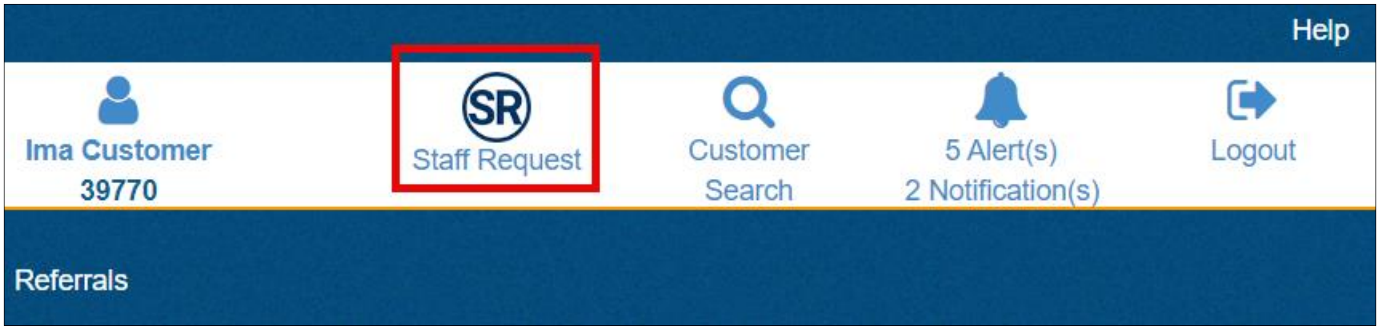
Actions Career Planners can take themselves without submitting a Staff Request

- In addition to the improvements to the actual submission and processing of a Staff Request, there have been additional permissions given to staff to reduce the number of requests that need to be submitted.
    - Career Planners can now edit the Summary of their Notes with no time restraint.
    - Career Planners can delete Documents they have uploaded with no time restraint, so long as the document has not been tagged by another user.
    - Career Planners can edit or delete Measurable Skill Gains within 72 hours.

Creation of Staff Requests

New Staff Requests can be created from the exact page in which the changes must be made.

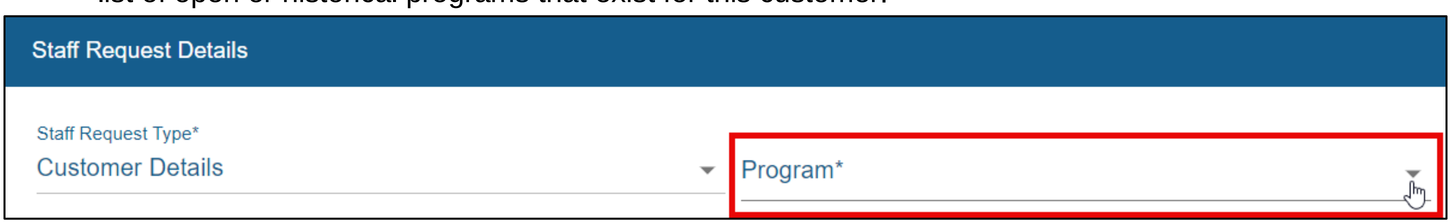
- When viewing the details page that requires correction, select the "SR Staff Request" icon to the right of the customer's name and PIN.

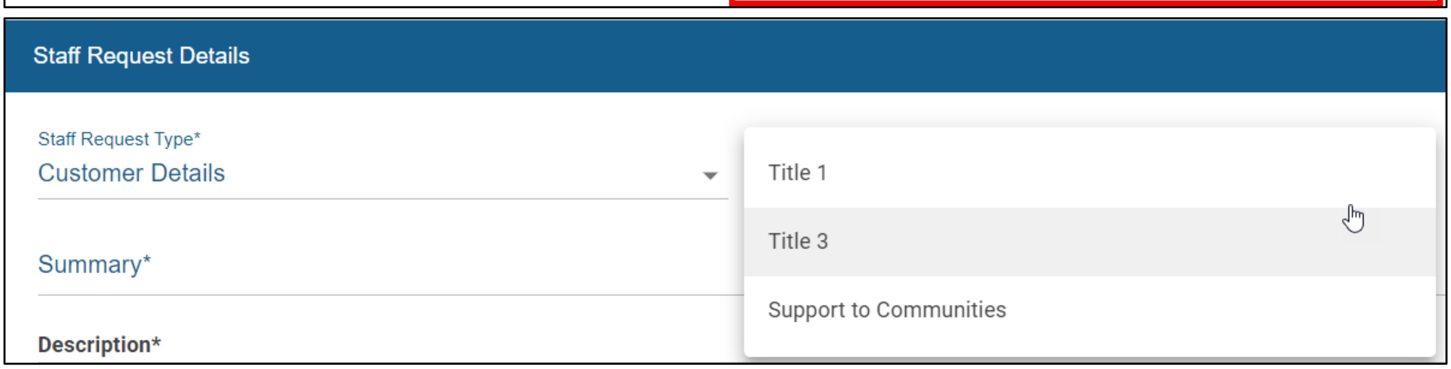


- Certain details from the record will be auto-populated into the Staff Request. This will allow staff to confirm data points that they may wish to refer to when entering the details of their request.

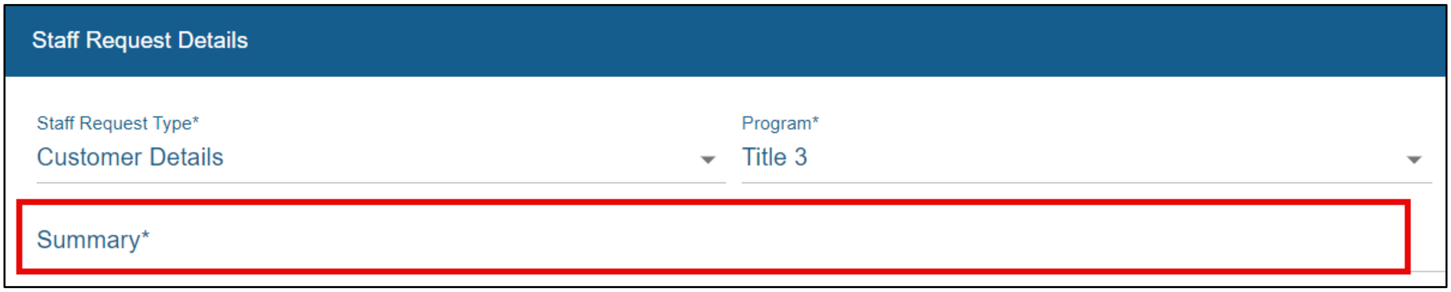
- If a field is blank, that means it is not populated on the underlying record.

- The program will be pre-populated for certain Staff Requests, based on the details of the record. For instance, a Staff Request made for a program or service will have the program value pre-populated, because it is already known. For other types of Staff Requests, staff will be required to select from a list of open or historical programs that exist for this customer.

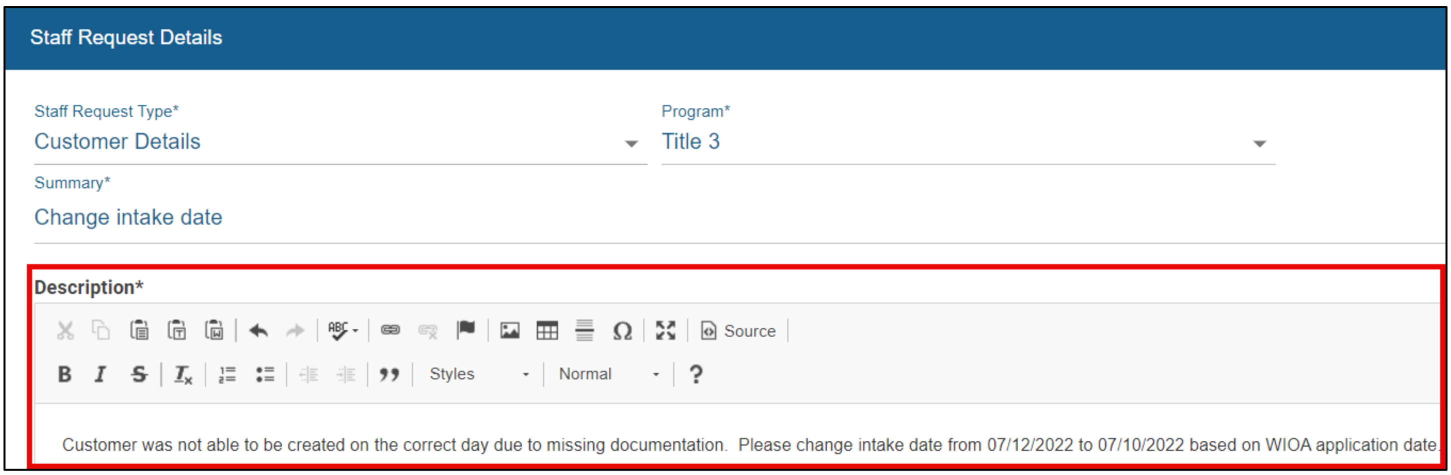




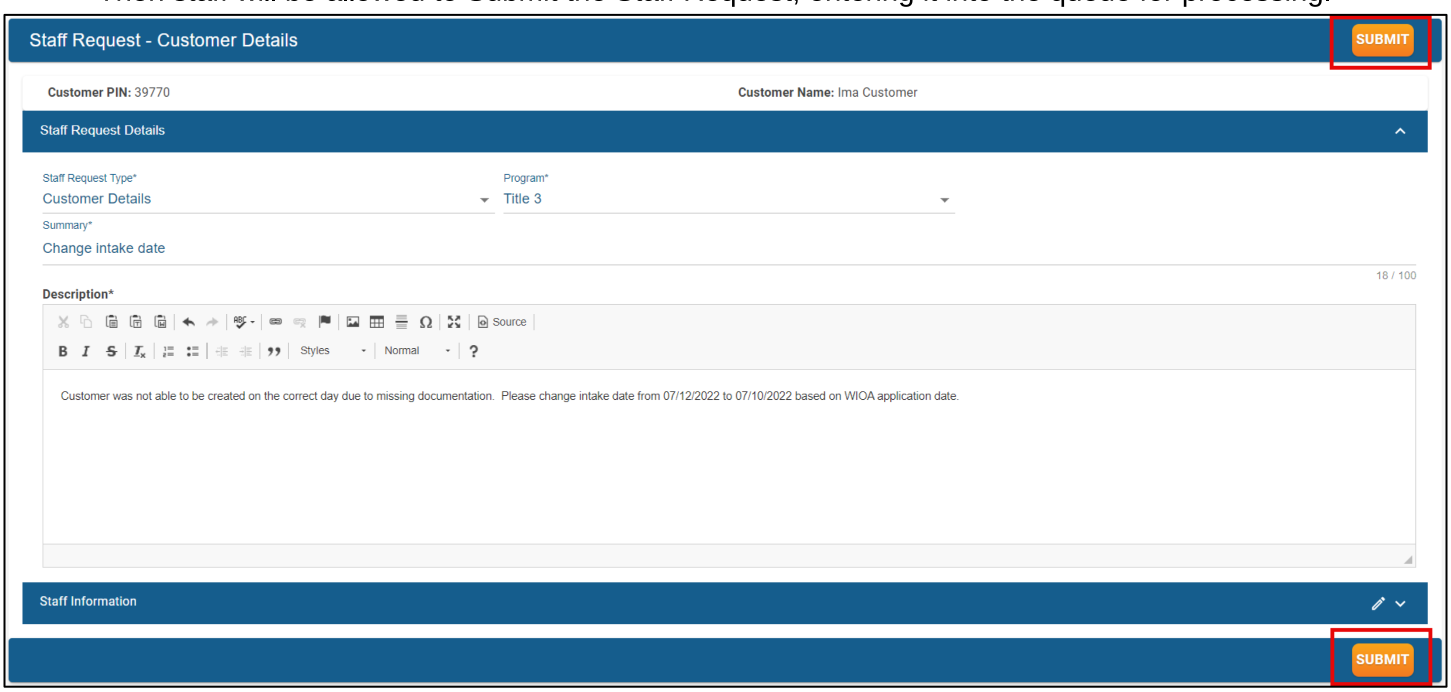
- Staff will need to enter a Summary of the Staff Request. This Summary should be meaningful to help staff understand what kind of change is needed before they even review the details of the request.



- Staff will then enter all the details of the request (both the need for the change and also the specific changes to be made) into the Description. This field allows for HTML text controls, which will allow you to format your request if that's beneficial. Include in the request all of the required fields that Administrators will need to complete in order to make the change. Sometimes an attempt to "save" the page that requires change will highlight any of the missing, required fields.

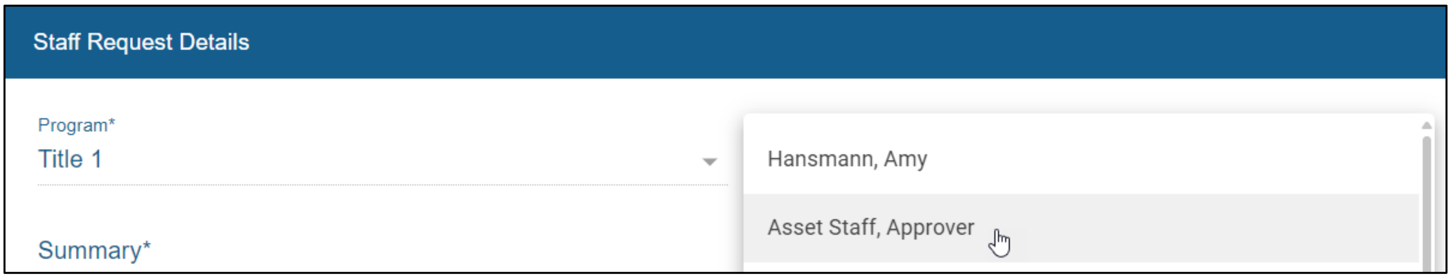


- Then staff will be allowed to Submit the Staff Request, entering it into the queue for processing.



Staff Request Approval Processes and Statuses

- Some programs have special approvals that must be completed before the Staff Request can be processed.
- Title 1
    - If the program selected is Title 1, staff will be prompted to select from a list of Approvers within their WDA. The Staff Request will be in "Needs WDA Approval" status.



    - After the Staff Request has been reviewed by the selected WDA Approver, it can be sent back to the creator in "Needs More Info" status, "Denied" or sent on to "Needs QA Review" status for the next level of approval.
    - After the Local Program Liaison/QA Reviewer for that WDA reviews the Staff Request, it can be sent back to the creator in "Needs More Info" status, "Denied" or sent on to an Administrator in "Ready for Admin" status.
    - After the ASSET Administrator reviews the Staff Request, it can be sent back to the creator in "Needs More Info" status, "Denied" or "Completed."
    - In less common cases the Administrator may set the Staff Request to "Waiting for I.T." status while more time-consuming corrections are made.
- TAA
    - If the program selected is TAA, the Staff Request will be in "Needs QA Review" status.
    - After the QA Reviewer for that WDA reviews the Staff Request, it can be sent back to the creator in "Needs More Info" status, "Denied" or sent on to an Administrator in "Ready for Admin" status.
    - After the ASSET Administrator reviews the Staff Request, it can be sent back to the creator in "Needs More Info" status, "Denied" or "Completed."
    - In less common cases the Administrator may set the Staff Request to "Waiting for I.T." status while more time-consuming corrections are made.
- All other programs
    - If the program selected is anything other than Title 1 or TAA, the Staff Request will be in "Ready for Admin" status.
    - After the ASSET Administrator reviews the Staff Request, it can be sent back to the creator in "Needs More Info" status, "Denied" or "Completed."
    - In less common cases the Administrator may set the Staff Request to "Waiting for I.T." status while more time-consuming corrections are made.

- Status definitions
  - Needs WDA Approval
    - Only an available status for Title 1 Staff Requests.
    - The request is waiting on the first stage of approval from the selected Approver in the creator's WDA.
  - Needs QA Review
    - An available status for Title 1 and TAA Staff Requests.
    - The request is waiting on review from the QA Reviewer for that WDA.
  - Ready for Admin
    - The request is ready for the ASSET Administrator to process.
  - Completed
    - The request was completed.
  - Denied
    - The request could not be completed as requested or even if an update/correction were made to the request.
  - Needs More Info
    - The request could possibly be completed but requires an additional level of detail.
    - Any time a request goes to the Needs More Info status it must go through every level of approval again.
  - Waiting for I.T.
    - The request is being completed but will take days to weeks to resolve.
    - The request will remain in this status until it has been completed.
  - Withdrawn
    - The creator rescinded the request.

Staff Request Types

- There is a Staff Request Type for every kind of Staff Request that can be made.
- The following is a list of all types and if needed, any details on their intended use.
  - Customer Details
    - This Staff Request type can be used when there is data that must be updated on the Customer Details page that they cannot edit themselves.
    - This request type can be used to request deletion of a customer record.
    - This request type can also be used to submit requests that don't fall into one of the other categories below.
  - PIN Merge
    - This Staff Request type should be submitted when a single customer has two or more different PINs with program data.
    - Staff will need to enter all the other PINs that they believe should be merged into the customer record they are creating the request for.
    - Administrators will compare the data on the records and merge as appropriate so that all program data (services, notes, documents, etc.) are on the correct customer.
    - There will also be notifications generated for all staff with active case assignment on any PIN involved in a completed merge request, notifying them of the new record they must use going forward. A PIN that is merged into another customer record will be deleted after the data has been merged, so it will not be available anymore.

Customer Notifications

Start Date:

End Date:

Notification Type:

WDA: All WDAs

PIN:

Customer's Last Name:

Search

PIN	First Name	Last Name	Notification Type	Notification Date	Message	Career Planner
10909	Anna	Pachenko	Case Team	7/22/2024 3:05:02 PM	PIN 19927 has been merged with PIN 10909	Scales, Alison

    - Event History tracks every record that was moved from one customer to the other, as well as if any changes were made to which customer was kept and which was removed.

Event History

Search

Created Date	Event Description	Office	By
6/17/2024 2:03:51 PM	Program: Apprenticeship Pipeline 12/10/2019 moved from PIN 19927 to PIN 10909	0810	Scales, Alison
6/17/2024 2:03:28 PM	Master PIN changed from PIN 19927 to PIN 10909	0810	Scales, Alison
6/10/2024 10:05:24 AM	Program: Title 3 moved from PIN 10909 to PIN 19927	0810	Scales, Alison
6/10/2024 10:04:39 AM	Program: Apprenticeship Pipeline 12/10/2019 moved from PIN 10909 to PIN 19927	0810	Scales, Alison
6/10/2024 10:04:58 AM	Program: Title 3 moved from PIN 10909 to PIN 19927	0810	Scales, Alison
6/10/2024 10:04:57 AM	Program: Title 1 Dislocated Worker 12/10/2019 moved from PIN 10909 to PIN 19927	0810	Scales, Alison
6/10/2024 10:04:15 AM	Master PIN changed from PIN 10909 to PIN 19927	0810	Scales, Alison
6/3/2024 3:45:08 PM	Program: Apprenticeship Pipeline 12/10/2019 moved from PIN 19927 to PIN 10909	0810	Scales, Alison
6/3/2024 3:45:02 PM	Program: Title 3 moved from PIN 19927 to PIN 10909	0810	Scales, Alison
6/3/2024 3:44:10 PM	Master PIN changed from PIN 19927 to PIN 10909	0810	Scales, Alison

Rows per page: 10   1-10 of 14

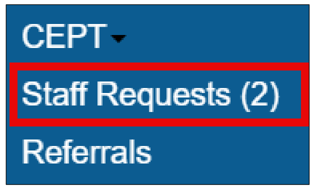
- Additionally, when a PIN Merge has been completed, each customer impacted by the merge will have Event History on their Customer Details page that indicates a merge has been completed. This can be used to identify if the customer you're looking at has ever had a merge completed. If you see significant changes to a customer record overnight and it's not clear why, this Event History will indicate where you should look to see more details.

Customer Event History			
Create Date	Event Description	Office	By
06/17/2024 02:03:51 PM	Check Event History of Staff Request: 1641 for PIN Merge updates	0810	Scales, Alison

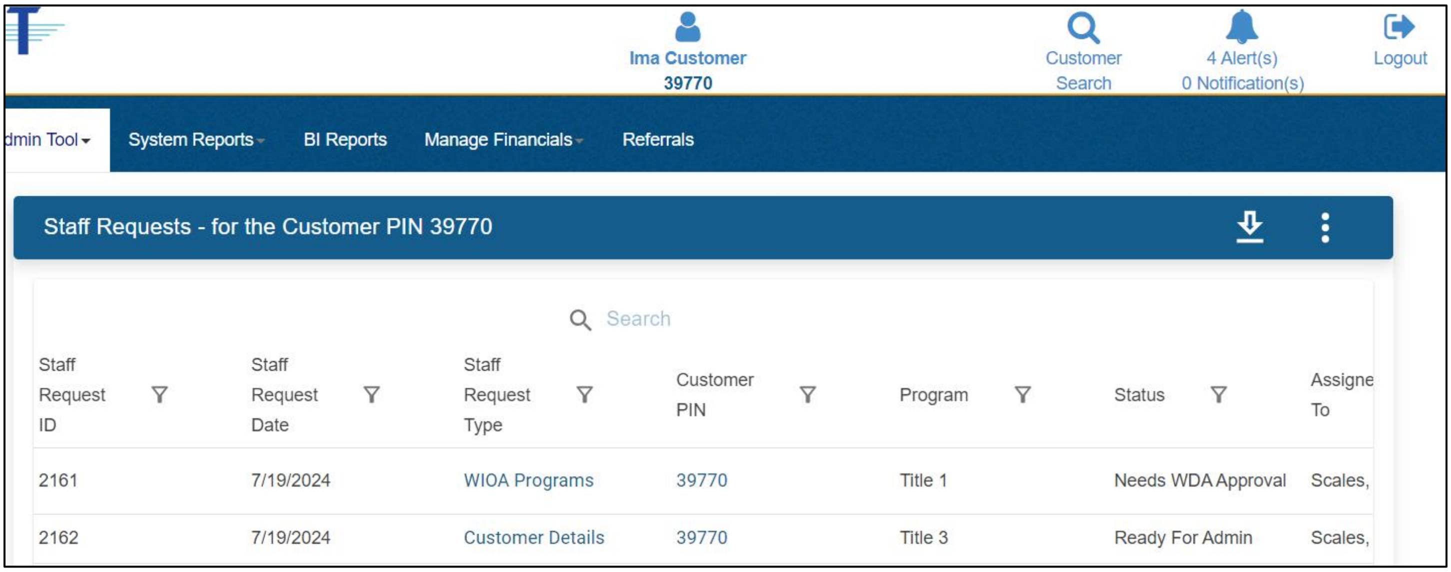
- Documents
- Employment
- Assessments – Assessments
- Assessments – Measurable Skill Gains
- Assessments – EFL Test Scores
- Assessments – Test Scores – Occupational / Educational
- Assessments – Test Scores – Out of School Youth (Literacy / Numeracy)
- Assessments – KeyTrain Tests
- Assessments – WorkKeys Tests
- Assessments – NCRC Certificates
- Employability Plan – Youth Skill Attainment
- Employability Plan – Skills to Develop
- Employability Plan – Job Readiness Steps
- Employability Plan – Individual Training Account
- Programs
- Services
- Exits
- Follow-ups – Credentials
- Follow-ups – Status
- Follow-ups – Services
- Customer Notes

Customer-level Staff Request View

- There is a Staff Request menu option within the Customer-level left-hand navigation menu.

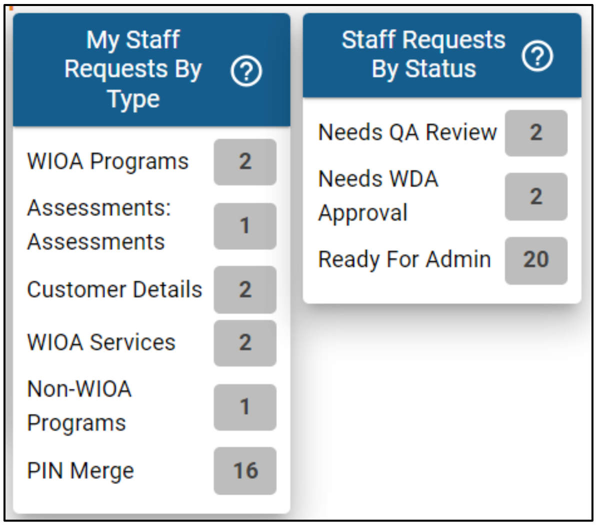


- This menu will show you all the Staff Requests that exist for that customer, regardless of the status of the request.
- The number that appears in parentheses next to the label is the count of open Staff Requests. If you are working with a customer and think you see something incorrect, you can use this page to check if there's already been a request submitted.

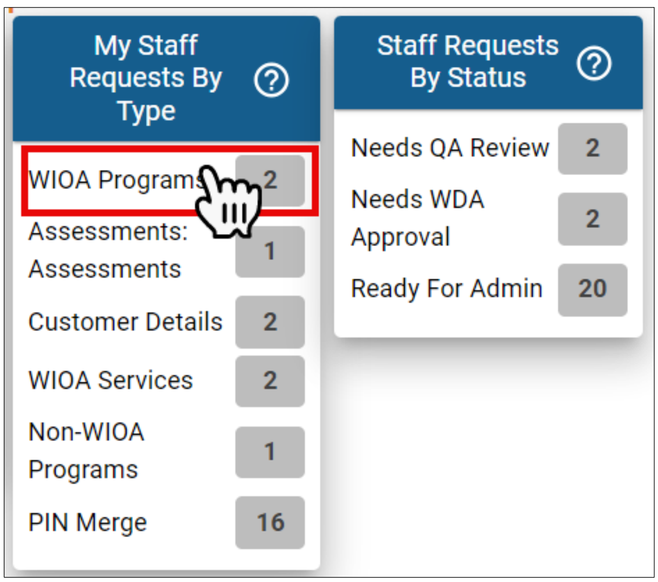


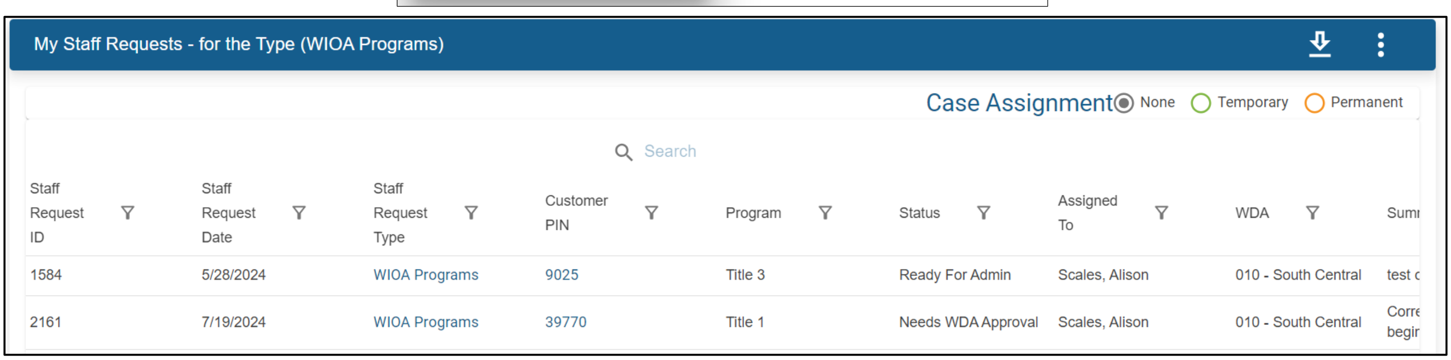
Staff Request Dashboard Tiles

- The ASSET Home will now give users two Dashboard tiles that give information about Staff Requests.



- The "My Staff Requests by Type" tile shows you Staff Requests that you have created that are in an "open" status.
    - Staff Requests are grouped by their "type," showing you the count of open requests within each type.
    - If you click on one of the types, you'll be taken to a grid that shows you the records behind that count.





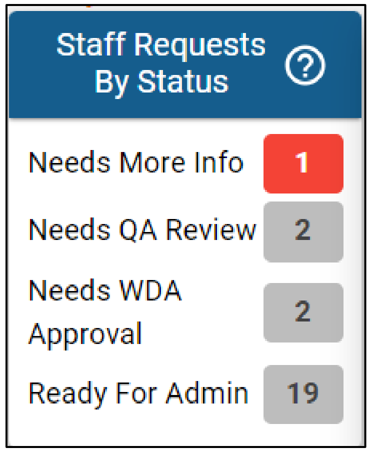
My Staff Requests - for the Type (WIOA Programs)

Case Assignment None Temporary Permanent

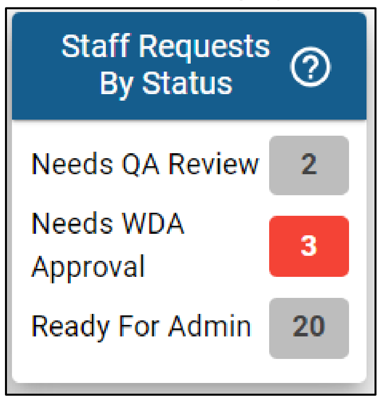
Search

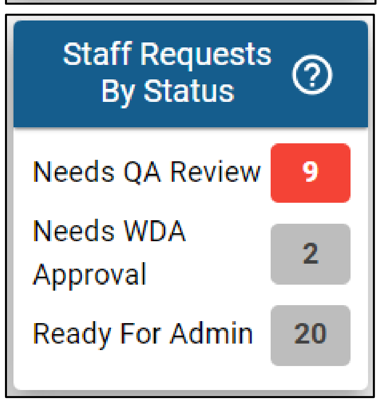
Staff Request ID	Staff Request Date	Staff Request Type	Customer PIN	Program	Status	Assigned To	WDA	Sumi
1584	5/28/2024	WIOA Programs	9025	Title 3	Ready For Admin	Scales, Alison	010 - South Central	test c
2161	7/19/2024	WIOA Programs	39770	Title 1	Needs WDA Approval	Scales, Alison	010 - South Central	Corre begir

- The "Staff Requests by Status" tile shows you Staff Requests that you have created as well as Staff Requests from other users that require your review and approval.
    - You can use this tile to check the status of all your open Staff Requests.
    - Staff Requests in "closed" statuses will remain on this tile for 10 days following their last update, to allow staff to verify the corrections made.
    - Staff Requests in statuses that require your review will show as red.
        - This is true for any request you have created that is in "Needs More Info" status



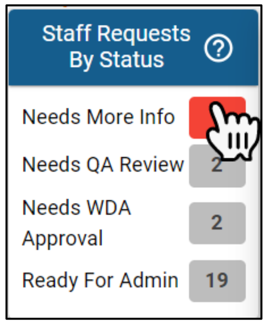
        - This is also true for requests created by other staff that require your approval, which is true of WDA Approvers and QA Reviewers.
            - This is based on your ASSET profile as well as the programs and WDAs selected under your Staff Preferences page.

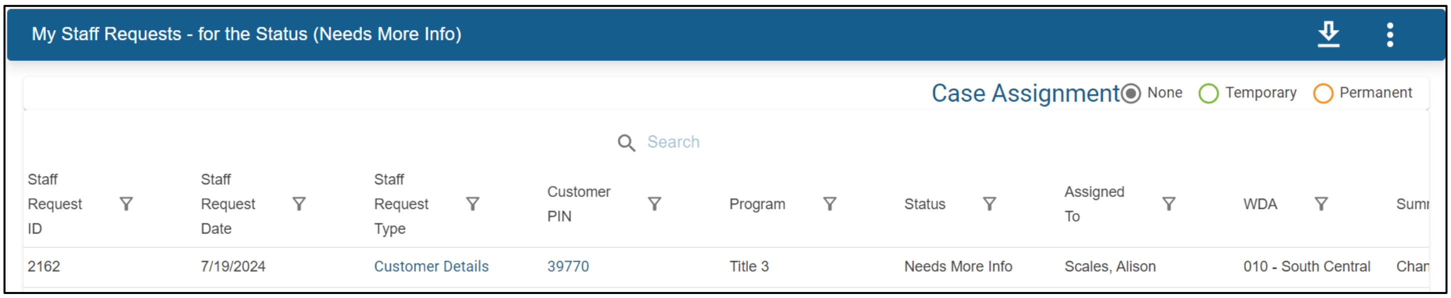




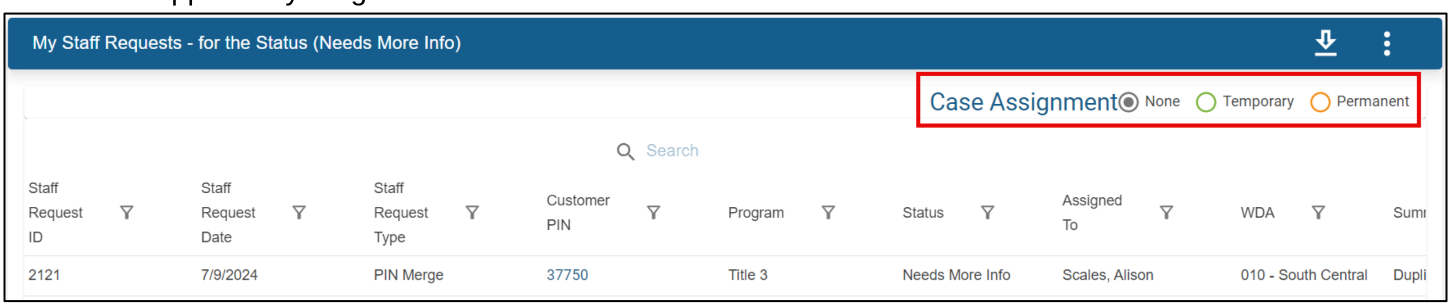
Working a Staff Request

- Once you have used your Dashboard tiles to identify what requests require your action you are ready to process the requests.
- Clicking on the row of the tile that you wish to work on will take you to a grid that displays the records behind that count.

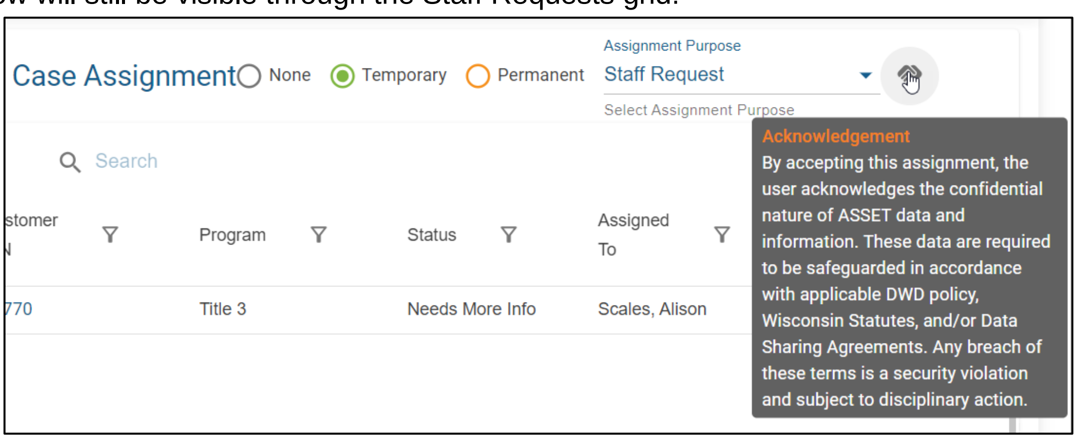




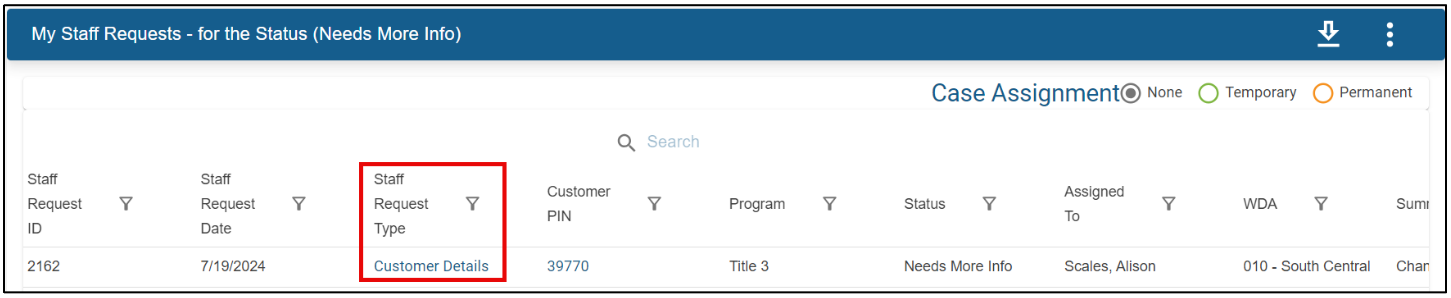
- The upper right-hand corner of this grid allows staff to take Case Assignment for any of the customers that appear in your grid.



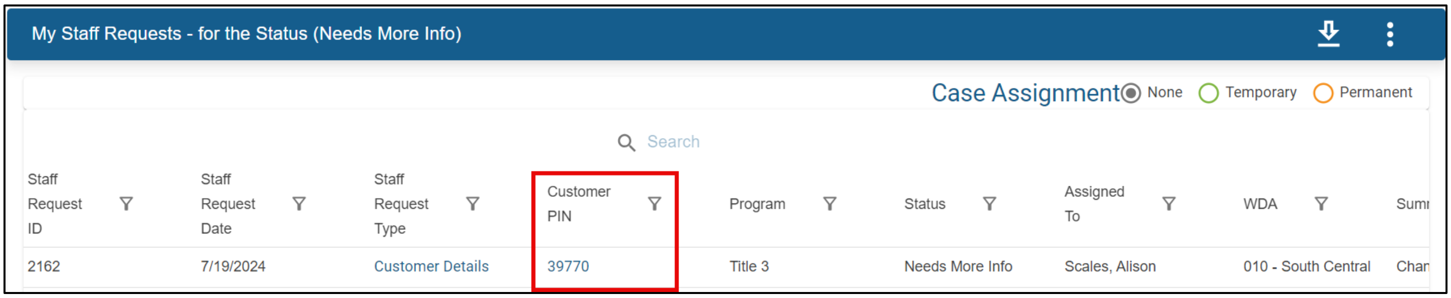
- If you do choose to take Case Assignment, first select the duration (temporary or permanent).
- You will then be required to select your purpose, which will default to "Staff Request."
- The same acknowledgement that would be displayed to the user via the normal Case Assignment workflow will still be visible through the Staff Requests grid:



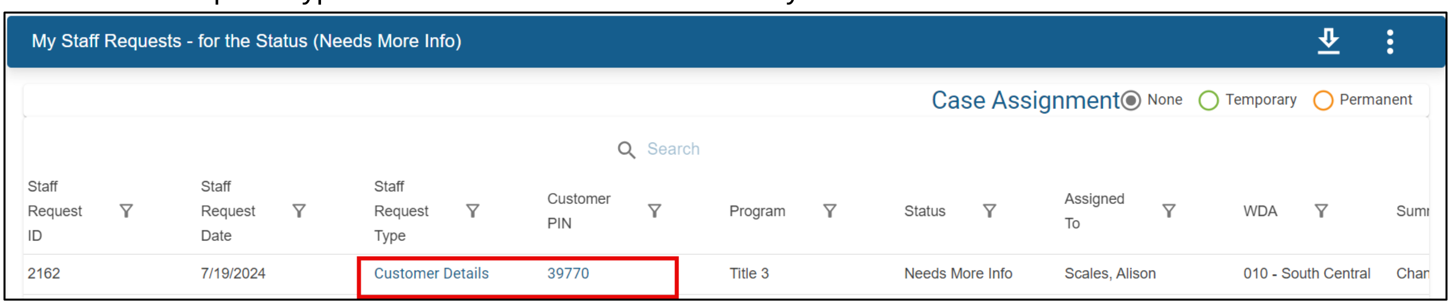
- After selecting your Case Assignment parameters, you will be given assignment for any customer you visit using a link from this grid.
- The Staff Request Type column contains a link to the underlying record from which the Staff Request was created (e.g. Customer Details, Document Details, Service Details, etc.).



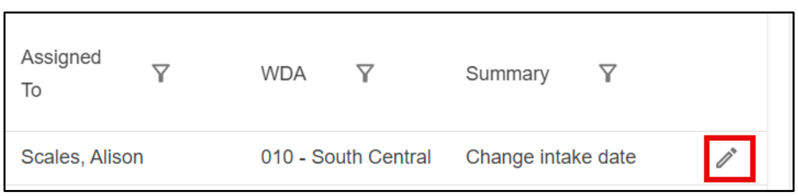
- The Customer PIN column will take you to the Customer Details page.



- For this example, because the Staff Request was created from the Customer Details page, both the Staff Request Type and Customer PIN links will take you to the same location.

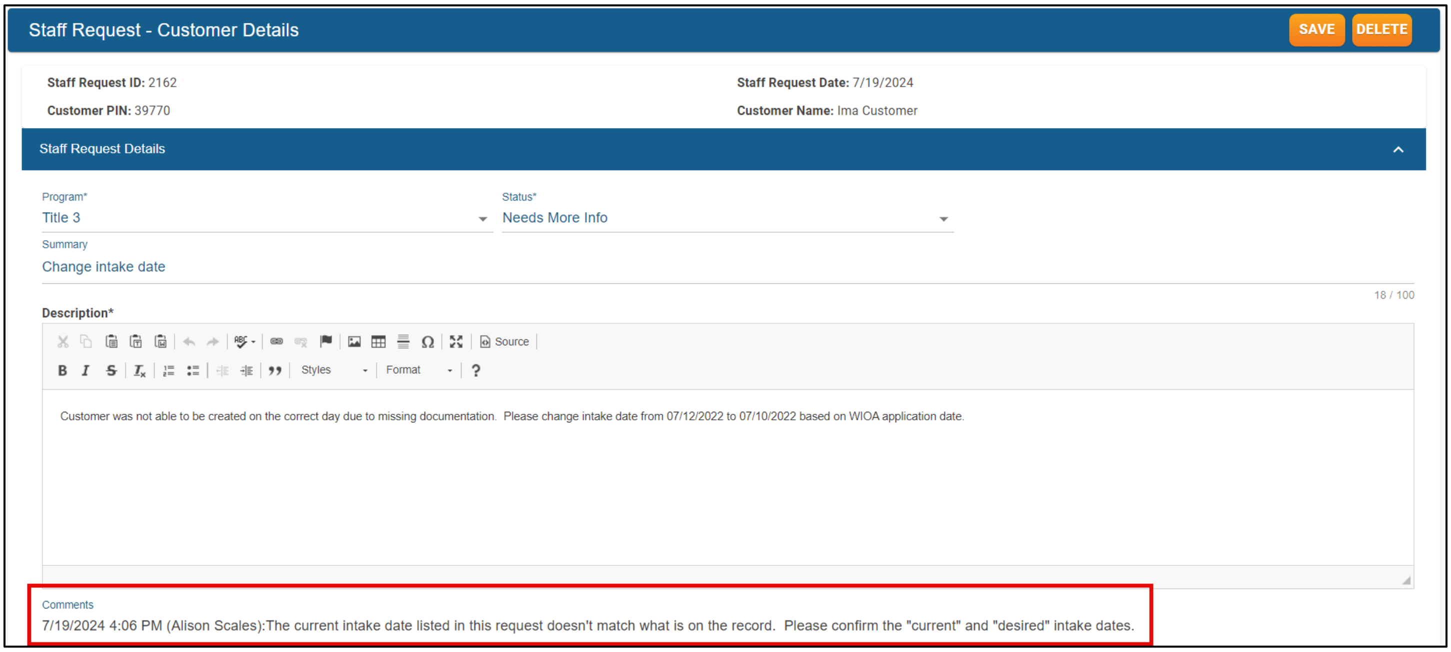


- To view the details of the request, select the Edit/pencil icon in the right-most column. Depending upon your screen size you may need to scroll to the right in order to access this column. Selecting this icon will open the Staff Request Details page *as well as* the underlying record (e.g. follow-up status, customer note, etc.). This will allow you to review the record at the same time as the request and immediately take action.

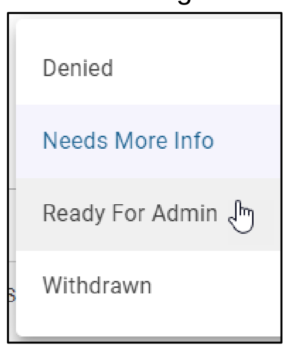


- The Staff Request Details page will show you the same fields that you entered when you created the request.

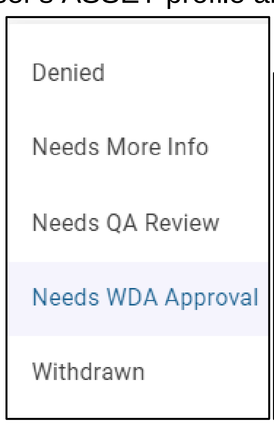
- The Comments section is a running discussion regarding what is being requested. This is where any feedback will be entered to request additional information or changes to the request. This is also where approvals can be listed, though the Event History will also track all status changes.

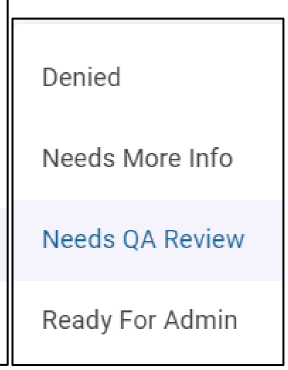


- Once you have finished making the changes and/or adding any comments as needed, make the necessary changes to the Status field before saving the request.



- The statuses that are available are based upon the program selected on the request, the current status of the Staff Request, the user's ASSET profile and whether they were the creator of the request.





- If the request needs additional processing, it will now be visible in the Dashboard tiles of the next staff person (Approver/QA Reviewer/Admin).

Completion of a Staff Request

- When all of the details have been captured and a request has received any necessary approvals, it is ready to be reviewed by the ASSET Administrator.
- Upon review, if the request cannot be completed, it will be denied. Staff are able to see their Denied Staff Requests in their "Staff Requests by Status" dashboard tile for 10 days after the status change.
- If the request can be completed, the action will be taken on the customer record and the request marked as Completed. Staff are able to see their Completed Staff Requests in their "Staff Requests by Status" dashboard tile for 10 days after the status change.
- If the completion of a Staff Request requires any additional work on behalf of the Career Planner, such as the entry of new services or Follow-up Status data, the Career Planner will be notified via email. This email will be sent as high priority to help ensure that the follow-up work is seen. The email will contain the customer PIN, staff request ID and staff request summary in the subject line. The body of the email will contain whatever follow-up action must be completed by the Career Planner.

History of a Staff Request

- Once a Staff Request has been completed, staff are able to check what was completed and when by leveraging the Comments and Event History on the request.
- All comments entered into a Staff Request track who saved the comment and when.

Comments
7/19/2024 4:06 PM (Alison Scales):The current intake date listed in this request doesn't match what is on the record. Please confirm the "current" and "desired" intake dates.
7/22/2024 2:59 PM (Alison Scales):I meant to request a change from 07/15/2022 to 07/10/2022.

- The Event History tracks all other changes to a Staff Request, such as status or assignee.

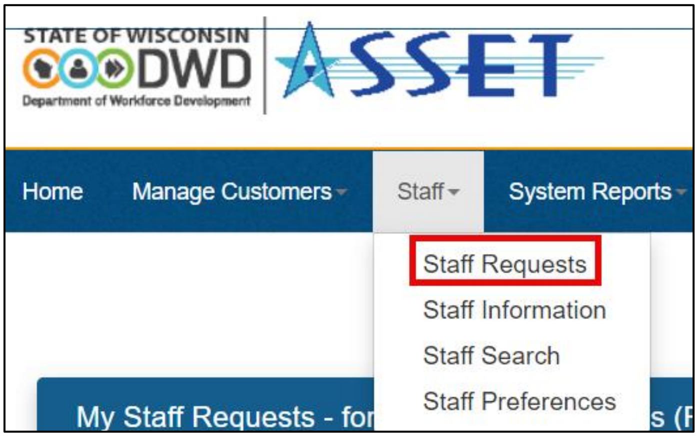
Event History

Search

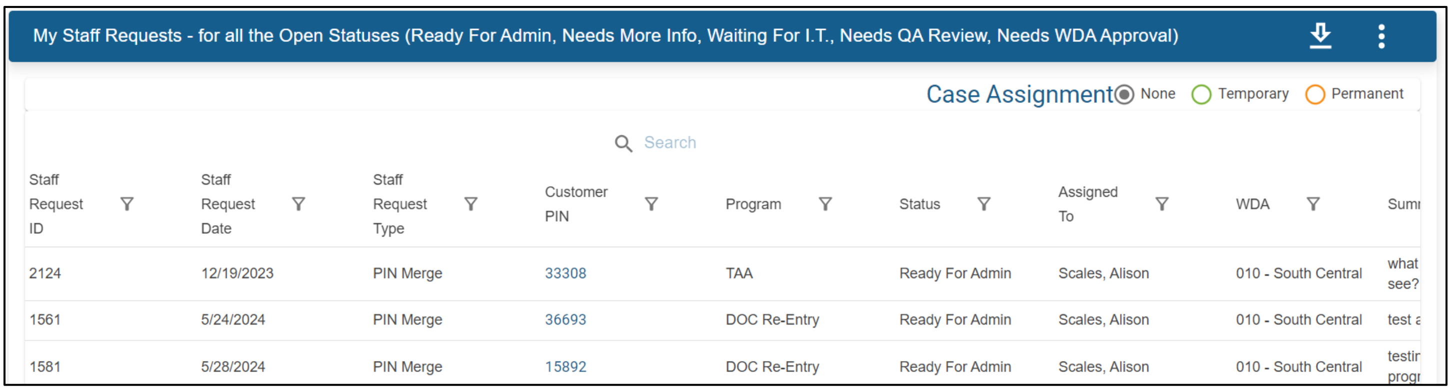
Created Date	Event Description	Office	By
8/9/2024 4:09:59 PM	Status changed from Ready For Admin to Completed	0810	Scales, Alison

Finding a Particular Staff Request

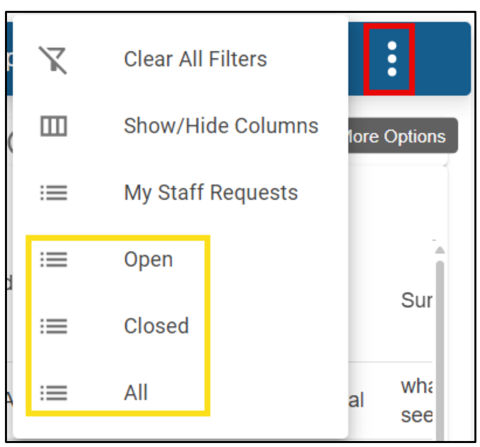
- Staff who are trying to process Staff Requests that need their attention can use the Dashboard tiles to identify what those requests are.
- Staff who are trying to look at a request that is not a part of their normal workflow can go the "Staff Requests" page. This may be necessary when covering for someone who is temporarily out or to track down a request completed more than 10 days ago.



- When Career Planners first go to this page, they will see all of their open Staff Requests.



- Using the filter in the upper right-hand corner of the grid, Career Planners can navigate to a broader view that will let them see all open staff requests, all closed staff requests, or all staff requests regardless of status.

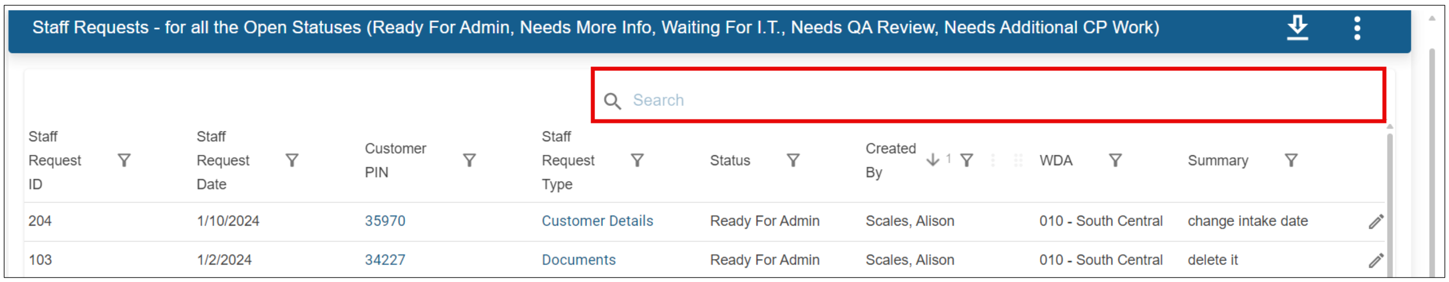


- Once staff have navigated to the pre-set filters that best match the search, they can use the searching/filtering capabilities to narrow their results to the exact record they need to find. The Appendix starting on the next page of this Technical Bulletin contains instructions on how to search and filter, which is consistent for all pages that use this technology.

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.

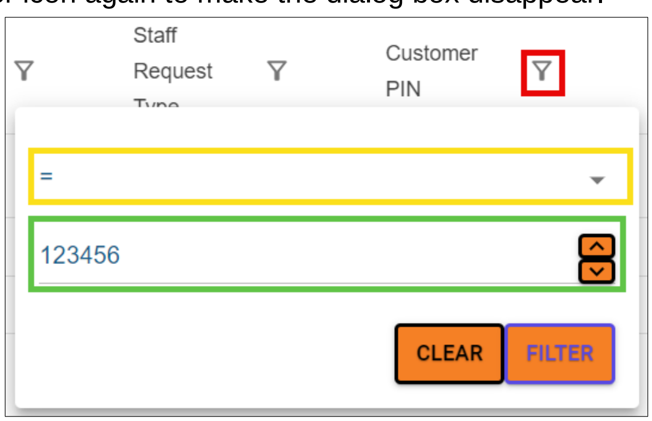
Searching – to look for certain keywords, numbers or dates within a group of records

- 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.

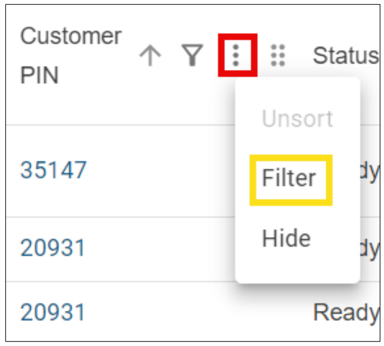


Filtering – to narrow the group of records you're viewing to those that match certain parameters

- 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 to make the dialog box disappear.

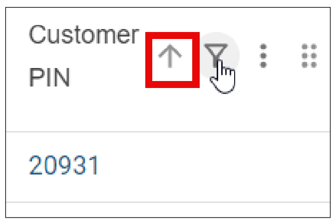


- Another way to filter is to click this vertical ellipses icon, visible when hovering with your mouse on or next to the "filter" funnel icon above. Selecting the word "Filter" will then bring up the same dialog box that allows the user to enter their filter parameters.
    - The red box shows the vertical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

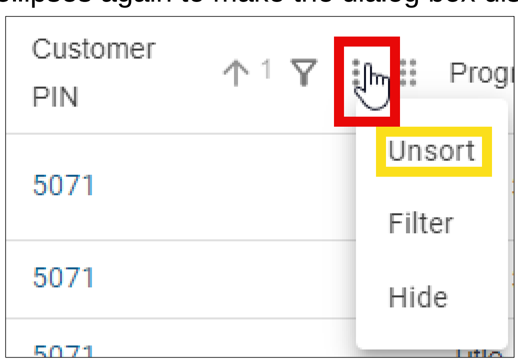


Sorting/Ordering **– to take the results you see and arrange them A-Z or largest to smallest**

- 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.

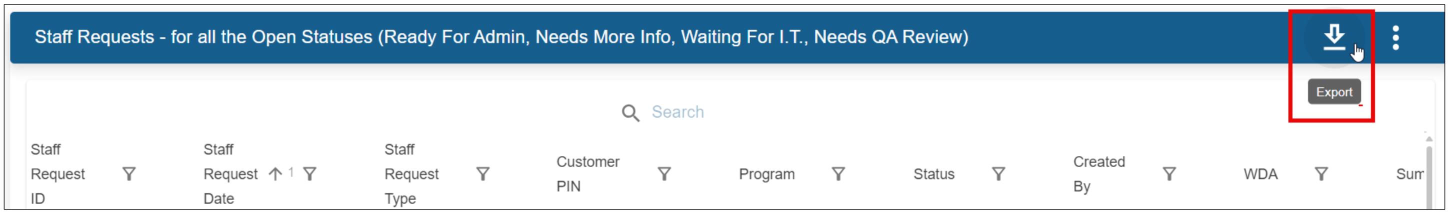


- Clicking the sort icon once will order the results that you see alphabetically or numerically. Clicking the sort icon again will reverse the sort order.
- To un-sort a column, hover your mouse on or near the filter icon and click on the vertical ellipses. This opens a dialog box. Select "Unsort" and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



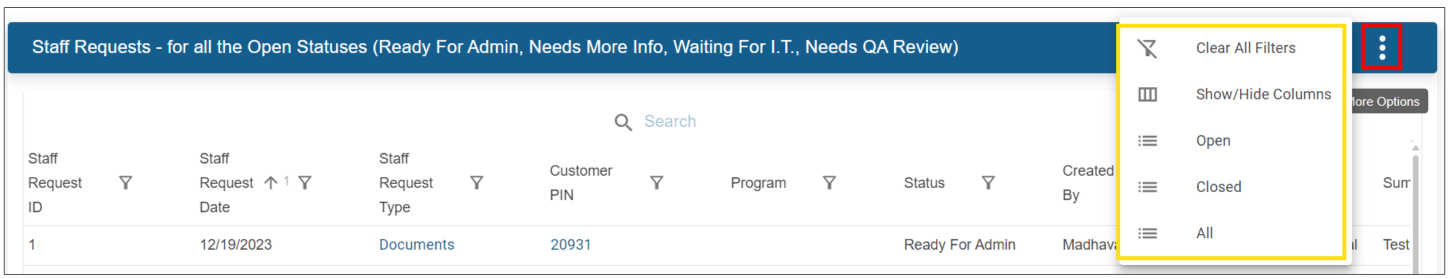
Exporting – to take the results you see on the screen and download them as a file

- 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.

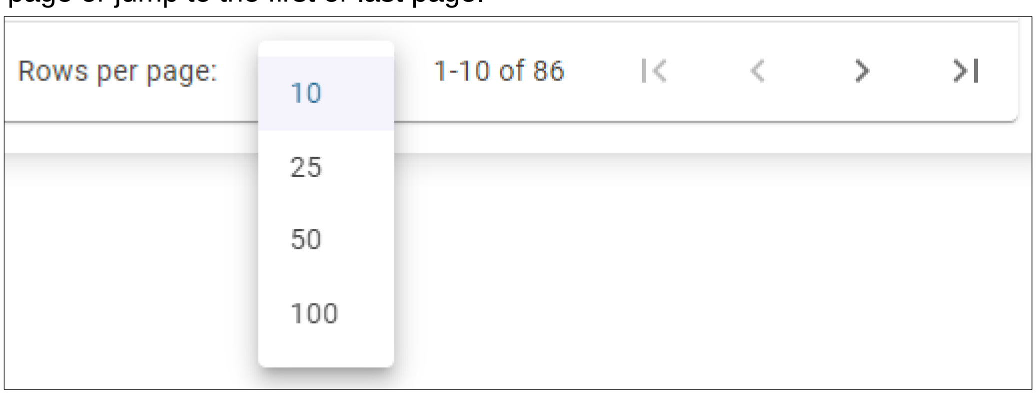


Other features

- 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 within the grid to collapse these additional options.

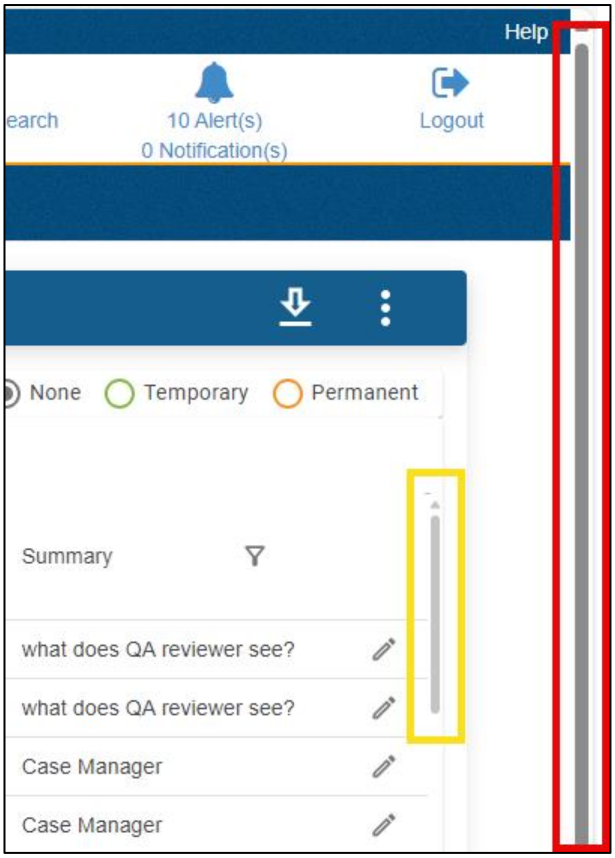


  - The additional options given above are:
    - To clear all the filters the user has applied.
    - To show or hide columns. This can be used to hide a column that isn't needed for your purposes, or show any columns you've previously hidden.
    - Certain grids have pre-defined filters that allow users 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 rex 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.



- Hovering your mouse on or near the filter icon will allow the user to select the double vertical ellipses. Clicking and holding this icon allows the user to drag and drop the columns to change their order from left to right.