

ASSET Technical Bulletin

ASSET Changes – Will be deployed on January 13, 2025

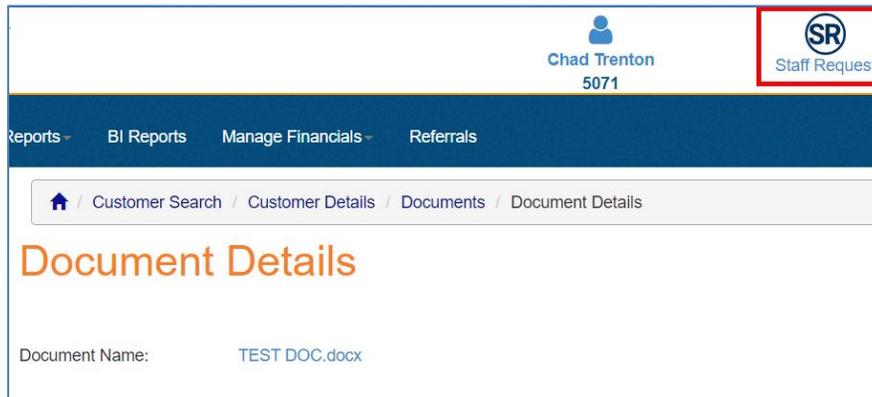
Fixes put in place to address system errors

- Staff will be able to take case assignment through the normal processes again for customers who have an apostrophe in their name. For any customers whose record was edited to remove the apostrophe, Career Planners may now correct the customer name.
- Staff will be able to access customer records with out of state addresses again. If the customer had an invalid county saved to their record, this field will now be NULL. Staff will be prompted to select a new, correct county when saving changes to the Customer Details for these customers.

Tips for Staff Request submission

- When submitting a Staff Request, pay attention to the page you're currently on when you create your request.
- If changes need to be made to a service, program, note, document, etc., go to that specific record to make your request. This will pull data points from that record (like Actual Start Date or Document Name) into the request details. Additionally, this will link the processor back to the specific page on which they need to make modifications. This is particularly helpful when there are multiple services with the same name, or multiple pages of documents to search.

For example, here on the Document Details page you can create a Staff Request:



When entering the details of this staff request, some of the document information will be auto-populated:

Staff Request - Documents	
Customer PIN: 5071	Customer Name: Chad Trenton
Document Name: TEST DOC.docx	Document Type: Self-attestation
Program(s) selected for document: Title 1 - DW	
Staff Request Details	

The staff request processor will then have a link directly to the exact document on which you need the changes, eliminating the need to search through multiple pages of similarly named files:

Staff Requests - for all the Open Statuses (Ready For Admin, Needs More Info, ...)				
Staff Request ID	Staff Request Date	Staff Request Type	Customer PIN	
3502	1/10/2025	Documents	5071	5071

- If you need to open an episode back up to make changes, there are various ways you could accomplish this based on what you want to see happen:
 - Remember that for an episode to be re-opened, any Follow-up Status that exists will need to be deleted. If you are requesting for an episode exit to be removed and there is a Follow-up Status, keep in mind this will need to be manually re-added after the episode has re-exited.
 - If the change you need is for new services to be added, you could submit a Staff Request from the specific program or from the episode exit details, and request that you be notified when it is open again for you to take action. Administrators can now send automated emails to the person assigned to the Staff Request to inform them as soon as it's been completed. This will give you time to make necessary changes before the program re-exits at 6 pm with the run of the Common Exit process.
 - If you need to modify existing services, you could submit a Staff Request on each particular service that needs the change. When the Administrators re-open the program, they will then have a link to each specific service and it will be easy to verify changes are made to the correct services and that one wasn't skipped (see examples on the next page).

For example, here on the Service Details page you can create a Staff Request:

Chad Trenton
5071

SR
Staff Request

Reports - BI Reports Manage Financials Referrals

Home / Customer Search / Customer Details / Services Summary / Service Details

Service Details

Save

Event History

Program Name: Title 1
Program Area: Adult

The staff request processor will then have a link directly to the exact service on which you need the changes, eliminating the need to search through potentially dozens of services:

Staff Requests - for all the Open Statuses (Ready For Admin, Needs More Info, W

5071

Staff Request ID	Staff Request Date	Staff Request Type	Customer PIN
3522	1/10/2025	WIOA Services	5071