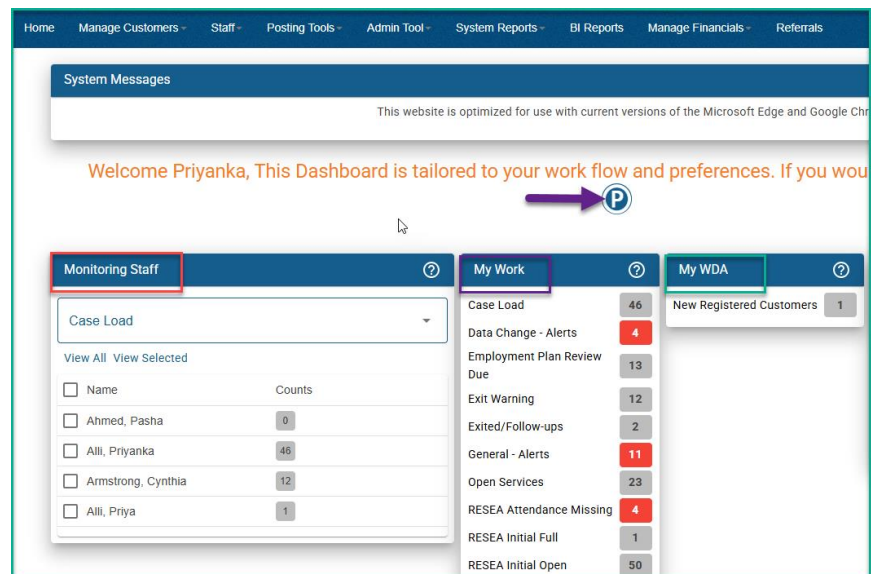

ASSET Technical Bulletin

ASSET Changes – Will be deployed on June 11th, 2025

ASSET Case Manager Dashboard P2 Overview:

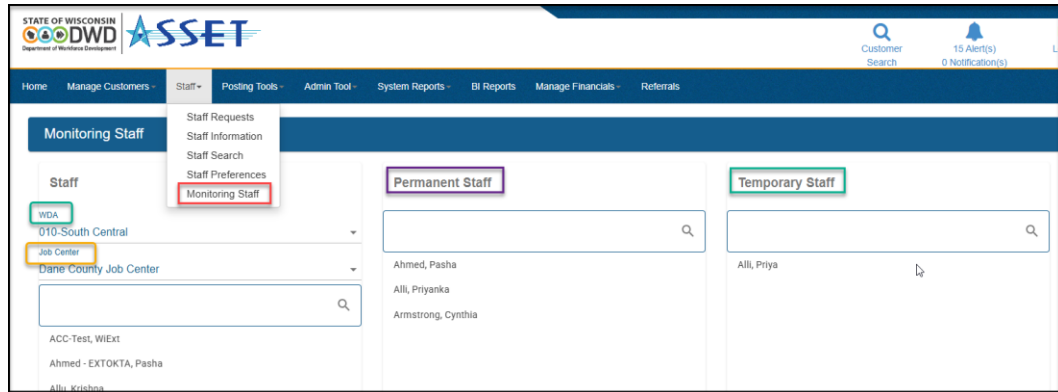
ASSET update introduces enhancements to the **ASSET Case Manager Dashboard P2**, focusing on improved monitoring capabilities, personalized work views, and streamlined reporting. Key components include:

- Monitoring Staff
- My Work
- My WDA
- System Reports
- Access



1) Monitoring Staff

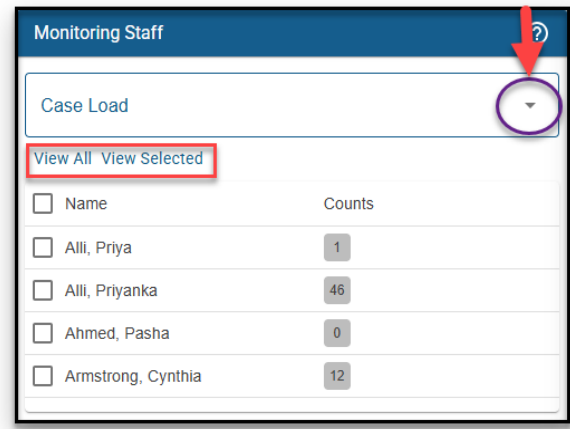
- **Access:** To view the Monitoring Staff tile on the Home page, staff must request DET security for "**Dashboard – Monitoring Staff**" special access.
- **Purpose:** This access enables staff to supervise, monitor, or review career planner's caseloads (For e.g., Supervisors/Managers, QA reviewers, LPLs, LVERs, TAA Liaisons)
- **Setup:**
 - Navigate to the Staff dropdown menu → select **Monitoring Staff**.
 - A page will display with filter options by WDA, Job Center, and a field to search staff names. Based on WDA selection, staff lists appear.
 - Drag & drop staff names into either:
 - **Permanent Staff** (for ongoing supervising/monitoring/reviewing within the same WDA)
 - **Temporary Staff** (for short-term supervising/monitoring/reviewing from a different WDA)



- **Dashboard View:** The Home page "Monitoring Staff" tile lists monitored staff.

- **Capabilities:** Monitoring staff can view counts of:

- Caseloads
- Open Services
- Case Managed Veterans
- Employment Plan Review dues
- Exit Warnings
- Follow-ups
- TAA Waiver Review
- TAA Waiver Deadline
- TAA Training Benchmark Review
- RESEA Attendance Missing



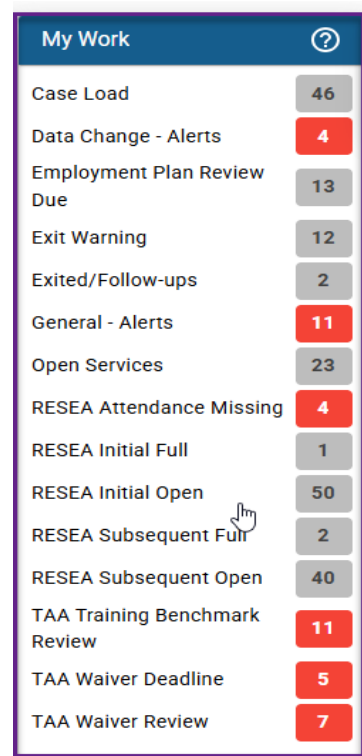
- **Navigation:**

- **View All:** Displays details for all staff under the tile.
- **View Selected:** Displays counts for only selected staff via checkboxes.
- Counts link to system reports with a monitoring view.
- Arrow buttons provide detailed Career Planner (CP) views.

Case Load - Monitoring View									
Case Assignment									
Career Planner	Customer PIN	Customer Name	WDA	Job Center	Program	Co-enrolled Programs	Begin Date	End Date	
Career Planner: Alli, Priyanka (Total 46)									
Alli, Priyanka	15531	CLAIMANT II, JONATHAN	010 - South Central		Title 1 Adult	TAA	1/1/2022	4/1/2023	
Alli, Priyanka	41390	DVOP ELIGIBILITY, PRIYA	010 - South Central		Title 1 Adult	Title 3 JVS	6/3/2025	6/3/2025	
Alli, Priyanka	8431	MOORE, VERA	010 - South Central		Title 1 Adult		5/5/2022	7/11/2023	
Alli, Priyanka	36471	PHASE2, FOURTYFIVE	010 - South Central		Title 1 Adult	Title 1 Dislocated Worker	10/17/2000	10/17/2000	
Alli, Priyanka	41291	PHASE2, ONE	010 - South Central		Title 1 Adult		12/12/2021	12/12/2021	
Alli, Priyanka	42659	TEST1, PRIYA	010 - South Central		Title 1 Adult	TAA, Title 3 JVS	3/25/2025	3/25/2025	
Alli, Priyanka	14087	YOUTH, ELTON	010 - South Central		Title 1 Adult	STC, Title 1 Youth	10/5/2022	1/28/2023	

2) My Work

- Career Planners see counts of:
 - Caseloads
 - Open Services
 - Case Managed Veterans
 - Employment Plan Review dues
 - Exit Warnings
 - Follow-ups
 - TAA Waiver Review
 - TAA Waiver Deadline
 - TAA Training Benchmark Review
 - RESEA Initial Open
 - RESEA Initial Full
 - RESEA Subsequent Open
 - RESEA Subsequent Full
 - RESEA Attendance Missing
- Clicking on counts navigates directly to specific system reports.
- Absence of tiles indicates no active cases or open services for the staff.
- **Details:**
 - **Caseload:** Staff named under a program see caseload counts on ASSET Home Page → My Work Tile.
 - **Case Managed Veterans:** Staff with Title 3 JVSG preferences see counts if Actual open & planned close date services exist.
 - **Employment Plan Review Due:** Counts triggered by IEP/ISS services with planned/actual open and planned close dates.
 - **Exit Warning:** The Exit Warning Tile displays the number of individuals scheduled to exit within the next 90 days, enabling Career Planners to proactively update services, complete necessary documentation, and help prevent unplanned or untimely exits.
 - **Follow-ups:** Tile displays the number of people requiring follow up's that occur within one year after exit.
 - **Open Services:** Displays services with planned/actual open and planned close dates.
 - **RESEA:** If count is zero then there are no active sessions for the staff.
 - Attendance missing counts appear if session attendance isn't updated.

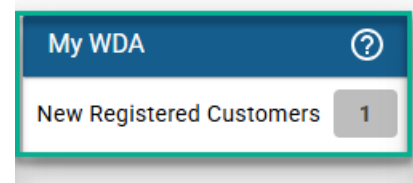


My Work ?	
Case Load	46
Data Change - Alerts	4
Employment Plan Review Due	13
Exit Warning	12
Exited/Follow-ups	2
General - Alerts	11
Open Services	23
RESEA Attendance Missing	4
RESEA Initial Full	1
RESEA Initial Open	50
RESEA Subsequent Full	2
RESEA Subsequent Open	40
TAA Training Benchmark Review	11
TAA Waiver Deadline	5
TAA Waiver Review	7

- **TAA Alerts:** A red alert appears 3 days prior to due dates on TAA tiles & will disappear once due date is updated.

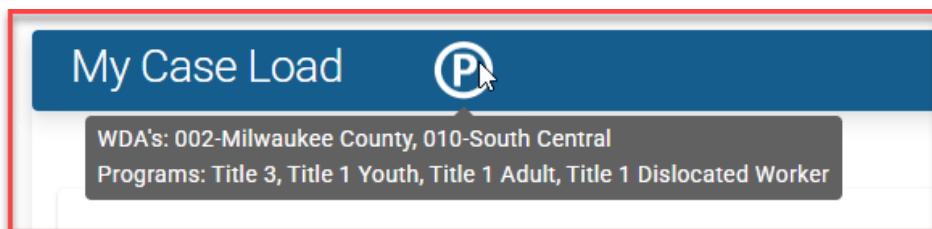
3) My WDA

- For staff with Title 3 and Title 3 JVSG preferences, the **new registered customers count** displays under ASSET Home Page → My WDA.
- Counts are based on selected WDA in staff preferences.



4) System Reports

- Clicking **System Reports** in the top menu and selecting a report (e.g., Case Load report) displays a "P" icon.



- Hovering over the "P" icon shows selected staff preferences; clicking it allows editing preferences.
- The **three-dot menu** at the top right offers a **Monitoring View** (for special access), replicating the Monitoring Staff tile information.

The screenshot shows a table titled 'Case Load - Monitoring View' with a 'P' icon. The table has columns: Career Planner, Customer PIN, Customer Name, WDA, Job Center, Program, Co-enrolled Programs, and dates. A dropdown menu is open on the right, showing options: Clear All Filters, Show/Hide Columns, My Case Load, My WDA(s) and Program(s), All WDA(s) and Program(s), and Monitoring View (selected). The table data is as follows:

Career Planner	Customer PIN	Customer Name	WDA	Job Center	Program	Co-enrolled Programs	Begin Date	End Date
Alii, Priyanka	15531	CLAIMANT II, JONATHAN	010 - South Central		Title 1 Adult	TAA	1/1/2022	4/1/2023
Alii, Priyanka	41390	DVOP ELIGIBILITY, PRIYA	010 - South Central		Title 1 Adult	Title 3 JVSG	6/3/2025	6/3/2025
Alii, Priyanka	8431	MOORE, VERA	010 - South Central		Title 1 Adult		5/5/2022	7/11/2023
Alii, Priyanka	36471	PHASE2, FOURTYFIVE	010 - South Central		Title 1 Adult	Title 1 Dislocated Worker	10/17/2000	10/17/2000
Alii, Priyanka	41291	PHASE2, ONE	010 - South Central		Title 1 Adult		12/12/2021	12/12/2022
Alii, Priyanka	42659	TEST1, PRIYA	010 - South Central		Title 1 Adult	TAA, Title 3 JVSG	3/25/2025	3/25/2025
Alii, Priyanka	14087	YOUTH, ELTON	010 - South Central		Title 1 Adult	STC, Title 1 Youth	10/5/2022	1/28/2023


- **SIM Deploy:** Changes for Youth Ineligible System Report are now deployed in production. (Customers marked as "Not eligible for Youth Program" (regardless of OSY/ISY status) should be included in the report)
-

5) Access

- For "**Dashboard- Monitoring Staff**" special access, submit a request to DET security with [DETS-10-E](#) including the details of the request in the comments section.
-


ASSET RDA Compliance Project Changes:


- Changes made to Customer Details screen
 - New fields have been added to allow a customer record to be excluded from the automatic deletion process for record retention compliance, to be used only when the customer meets the requirements for an extended retention period.
 - The fields are editable by Admins only. Please submit a staff request from the Customer Details screen to request a customer be marked to exclude from deletion.


E-Mail: 

☐ Unsubscribe from JCW Emails

☐ Make all information about this customer confidential.

☒ Exclude from 7-year RDA deletion process. 

* Reason for exclusion: 

Date when record can be deleted: 

[mm/dd/yyyy]

Alert page changes:

- 1) Unsnoozed alerts will be added to the top of the "My staff Alerts" table and will be highlighted so that staff can differentiate between them and new alerts.

Highlighted alert/s have been previously snoozed, they need action now

PIN/ID	Customer Name	Type	Date	Name	Description	Caree
43021	Alternate Registration	DVOP Eligible	4/17/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty
42091	Ambessa Madarda	Data Change	3/27/2025	Selective service registration required	Participant is about to turn 18 and must register with the Selective Services.	Shetty
42010	Mikasa Ackerman	General	5/27/2025	Training Documentation	Verify if any credential is available to enter in ASSET.	Shetty
43390	sahithya jcwregistration	DVOP Eligible	5/21/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty
43389	sahithya JCW	DVOP Eligible	5/21/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty

- 2) Individuals with "Monitoring staff" access will be able to view the following on the Alerts table:

PIN/ID	Customer Name	Type	Date	Name	Description	Career Planner	Job Center
42010	Mikasa Ackerman	General	5/27/2025	Training Documentation	Verify if any credential is available to enter in ASSET.	Shetty, Sarvika	0810 - Dane County Job Center
43390	sahithya jcwregistration	DVOP Eligible	5/21/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43389	sahithya JCW	DVOP Eligible	5/21/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43370	sahithya JCWVeteran	DVOP Eligible	5/20/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43349	Priya jvs eligible person	DVOP Eligible	5/15/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43319	Helen Clamp	DVOP Eligible	5/13/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43198	sahithya JVSJ	DVOP Eligible	5/5/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center
43178	Vera Cat	DVOP Eligible	5/1/2025	Customer eligible for DVOP services	Determine if customer desires the additional DVOP services. If Yes, conduct intake.	Shetty, Sarvika	0810 - Dane County Job Center

Dropdown menu options:

- Clear All Filters
- Show/Hide Columns
- Snoozed Alert(s)
- My Staff Alerts
- Cleared Alert(s)
- Snoozed Monitoring View
- Cleared Monitoring View
- Staff Alerts Monitoring View

- Snoozed Monitoring View – Ability to view the Snoozed alerts for the staff selected on the Monitoring staff page.

PIN/ID	Customer Name	Show On	Type	Date	Name	Description	Snoozed By	WDA's
Snoozed By: Powell, Rebecca (Total 2)								
39230	fourtyfour Phase2	6/7/2025 12:39:00 PM	General	2/27/2025	Follow-up Status Due	Review and update follow-up status - Q3	Powell, Rebecca	006 - North Central
35093	fourtyone Phase2	6/5/2025 12:39:23 PM	General	2/27/2025	Follow-up Status Due	Review and update follow-up status - Q3	Powell, Rebecca	006 - North Central
Snoozed By: Shetty, Sarvika (Total 86)								
Snoozed By: Borra, Sahithya (Total 3)								
Snoozed By: Kulkarni, Deepa (Total 123)								
Snoozed By: Madhavaram, Vani (Total 4)								

Rows per page: 500 1-198 of 198

- **Cleared Monitoring View** – Ability to view the alerts created in the past 90 days for the staff selected on the Monitoring staff page.

Cleared Alerts - Monitoring View

Download

More

Search

PINID	Customer Name	Cleared Date	Updated By	Type	Date	Name	Description	Cleared By	WDA's
> Cleared By: Shetty, Sarvika <div>Total 4</div>									
> Cleared By: Powell, Rebecca <div>Total 2</div>									
> Cleared By: Scales, Allison <div>Total 4</div>									
> Cleared By: Kulkarni, Deepa <div>Total 6</div>									
v Cleared By: Madhavaram, Vani <div>Total 2</div>									
21290	Vijay Mamukutty	3/19/2025	Madhavaram, Vani	Data Change	1/16/2025	Follow-up Status deleted by Administrator	Follow-up Status for "21290" deleted to complete Staff Request. Determine if previous Follow-up Status data needs to be entered.	Madhavaram, Vani	010 - South Central
21290	Vijay Mamukutty	3/19/2025	Madhavaram, Vani	Data Change	1/28/2025	Title-1 Program Work Authorization Expiration Date	Review the Work Authorization Expiration Date in the current Title-1 Program	Madhavaram, Vani	010 - South Central
Rows per page:									500
									1-18 of 18
									< < > >

- **Staff Alerts Monitoring view** – This page will show alerts that were generated in the past year for the staff selected on the Monitoring staff page. TAA and T1 Financial alerts and Vendor alerts are excluded from this list.

Staff Alerts - Monitoring View										
PINID	Customer Name	Type	Date	Name	Description	Status	Snoozed Count	Received By	WDA's	
>	Received By: Shetty, Sarvika	Total 304								
>	Received By: Powell, Rebecca	Total 70								
>	Received By: Borra, Sahithya	Total 41								
>	Received By: Kulkarni, Deepa	Total 146								
>	Received By: Madhavaram, Vani	Total 104								
>	Received By: Scales, Alison	Total 134								
>	Received By: Arellano, Carlo	Total 23								