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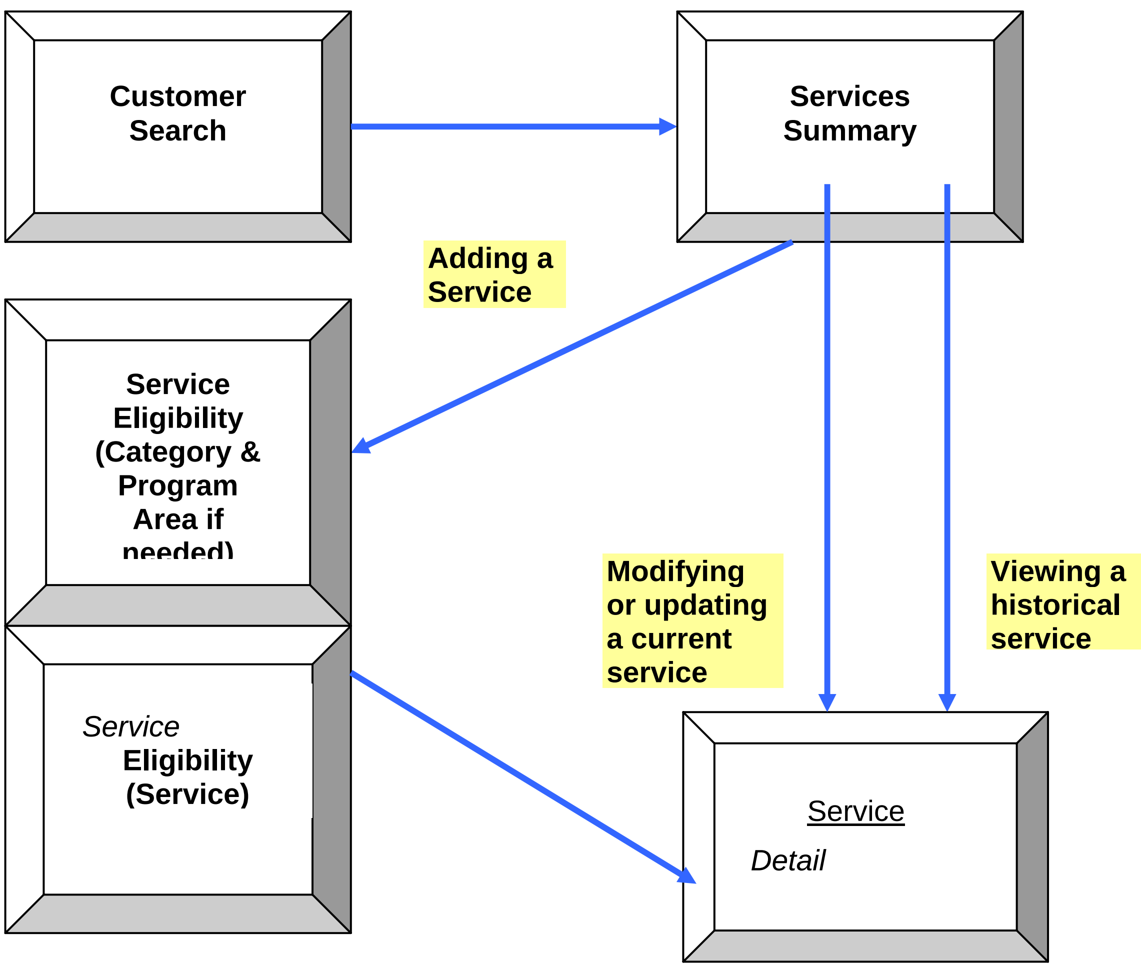
ASSET CASE MANAGEMENT FUNCTION

3-7 MANAGE SERVICES

The Manage Services function is used to track customer services and activities while participating in one or more of the Programs in ASSET. This function is important to federal reporting, making the accuracy and completeness of the information documented here critical for program evaluation and outcomes. To improve and protect the integrity of the information about services, the ASSET designs include several internal and page edits that require workers to enter data correctly.

Clicking on the Manage Services option on the Menu Tree launches the function. The first page is the familiar Search page, where the worker may choose a Previously Searched for Customer from the list, or do a Search or Advanced Search. This is the page flow for the Manage Services function:



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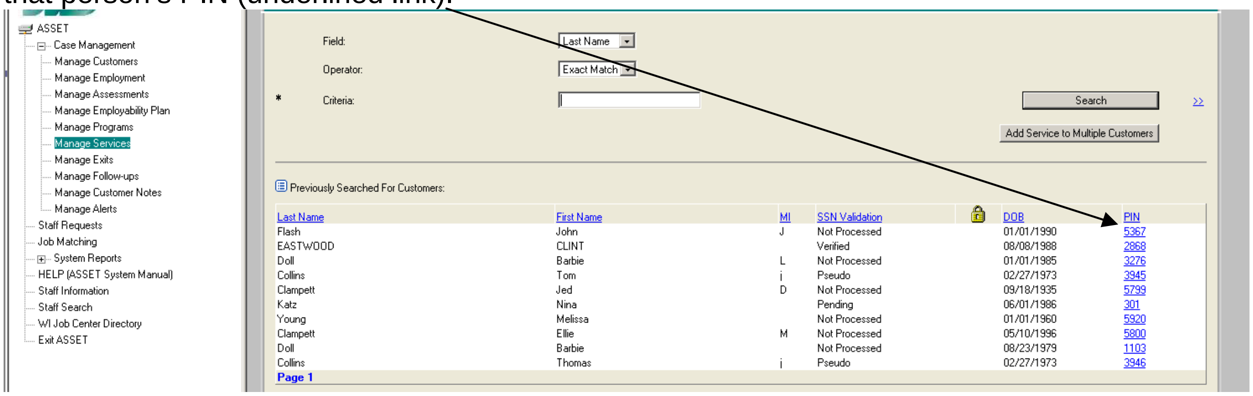
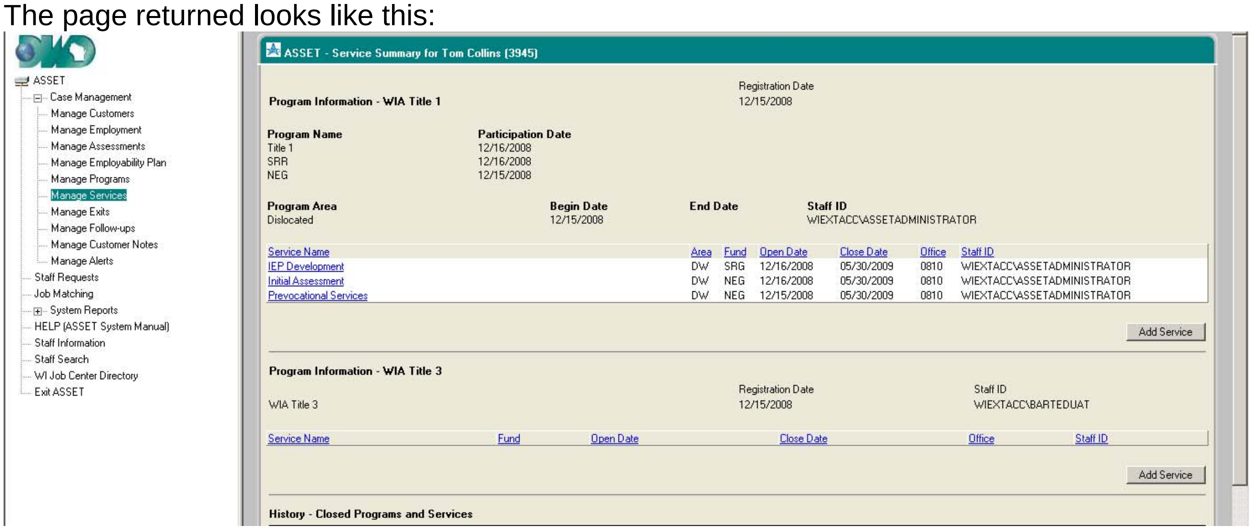
Using the Services Function to Report New Services:
There are two ways in which a worker can enter services for a customer. If entering a single service for an individual, search for the customer the service is being reported for and click on that person's PIN (underlined link).



The page returned looks like this:



Clicking on the Add Service to Multiple Customer's button returns the Search for the Multiple Customer's page. Using this functionality a Case Manager can a Add Service to Multiple Customers records using the same program and fund source. The page returned looks like the one in this example.

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Case Manager's who select the Program/Program Area of WIA Title I Youth will see additional functionality for posting of multiple services. The page displayed looks like this.

Next, click on the Get List button. The records returned are associated by the Youth Age Range that's selected by the case manager**.** Select the records for posting a service to by clicking on the checkbox located to the right of the PIN, or by clicking on the Select All button.

Then click on the Add Service to Selected Customers button. This returns the user to the Manage Services function for completion of the service information (as seen in 3-7, page 5). Once submitted, that service is recorded for each individual.

Note: The list for a case manager contains only those customers who have that worker listed as the case manager for that Program Area in Manage Programs.

Each of the Programs in which the customer is currently registered has its own section on the page. Since services may be reported only for Programs for which the customer is registered, the Summary Page presents these active Programs by section. For WIA Title 1, the Summary Page also lists all the Program Areas currently open for this customer. The page looks like this if more than one Program Area is open.

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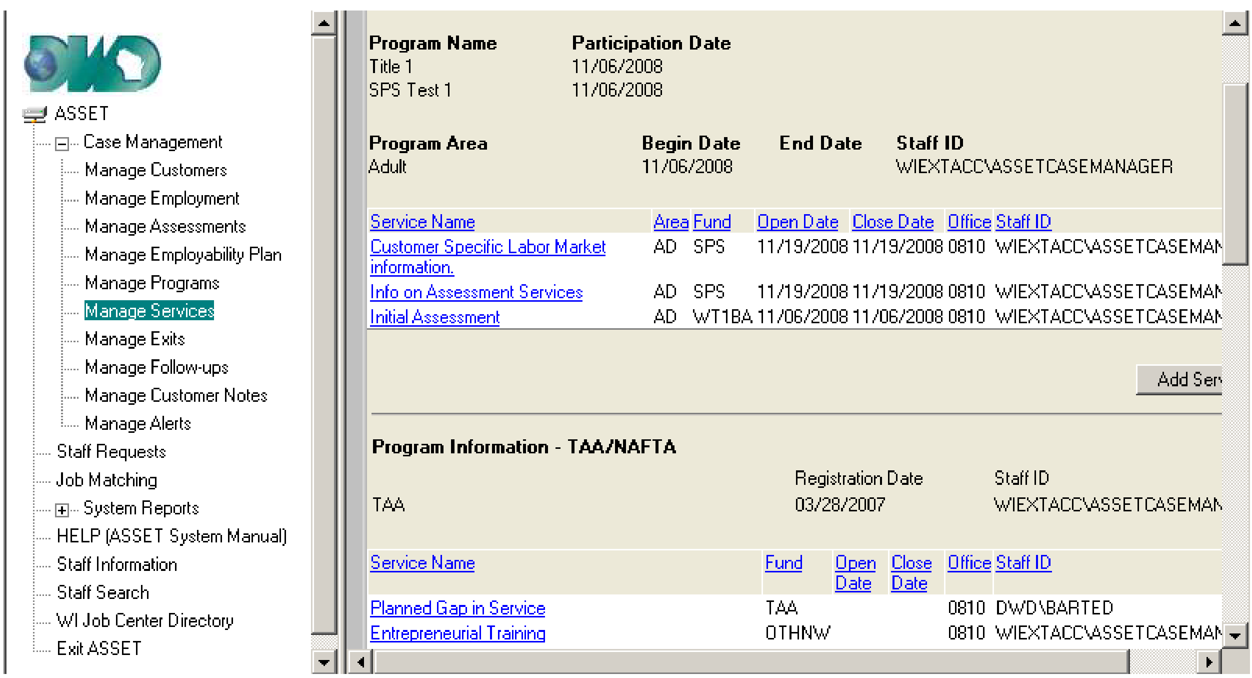
A new service is reported by clicking on the Add Service button under the appropriate Program.

When a new service is added, there are two intermediate pages presented. The first one is where the worker designates the Service Type Category. Once that is selected, the second intermediate page is where the worker designates the Service that is being reported. These two intermediate pages are:

Service Eligibility 1 – This page changes dynamically, depending if more than one WIA Title 1 Program Area is open. For TAA, Title 3 Wagner-Peyser, and when only one Title 1 Program Area is open, the page has just one field for entry. If there are two or more Program Areas open, the worker must also select which Program Area the service is being reported.



Workers must select the appropriate Service Category from the dropdown menu. The Service Categories are:

- Core Self or Informational Services
- Core Services Staff Assisted
- Intensive Services
- Needs Related Payments

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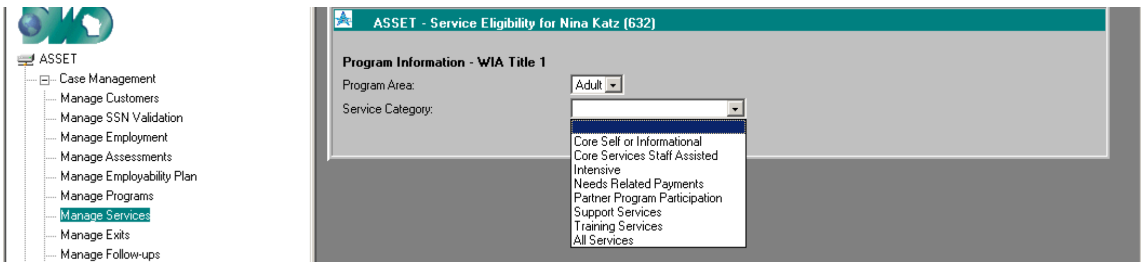
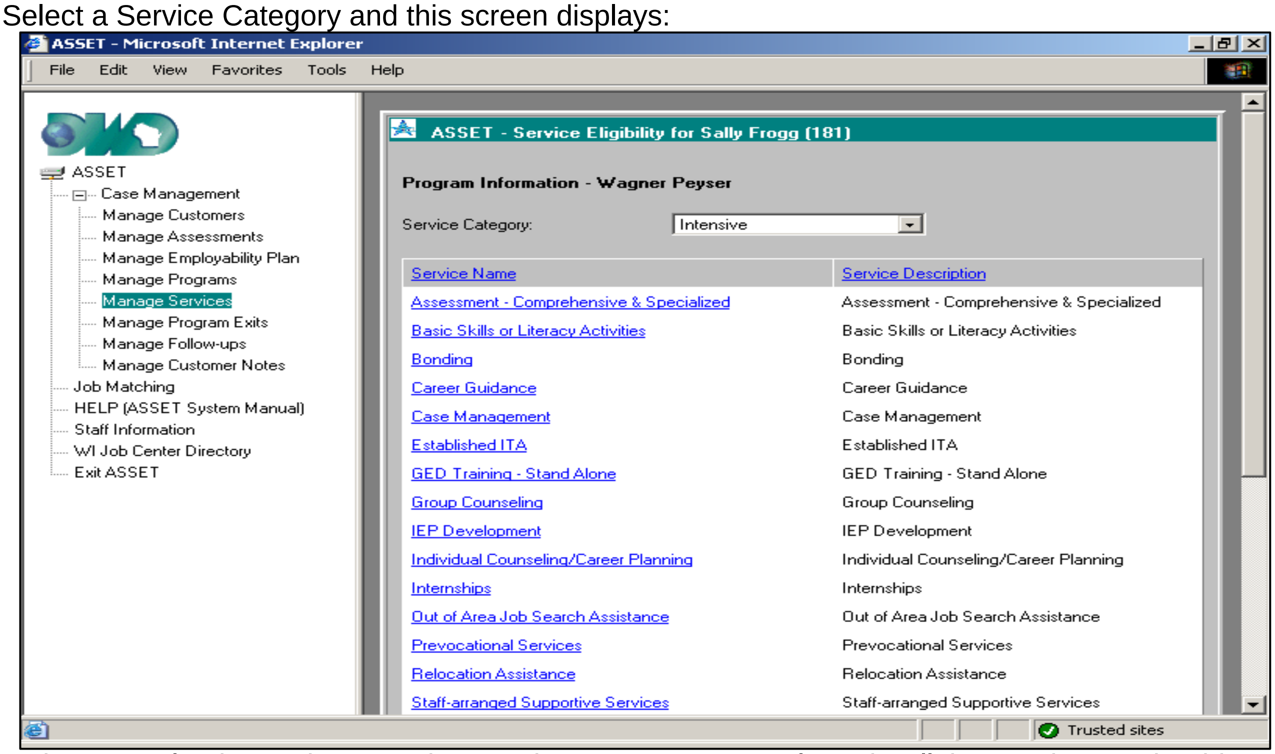
- Partner Program Participation
- Support Services
- Training Services
- All Services



Select a Service Category and this screen displays:



In the example above, the Intensive Service Category was selected. All the Services under this category are listed. To select the service to be reported, click on the name of the Service link (underlined). For example, if IEP Development is the service to be reported, click once on this link.

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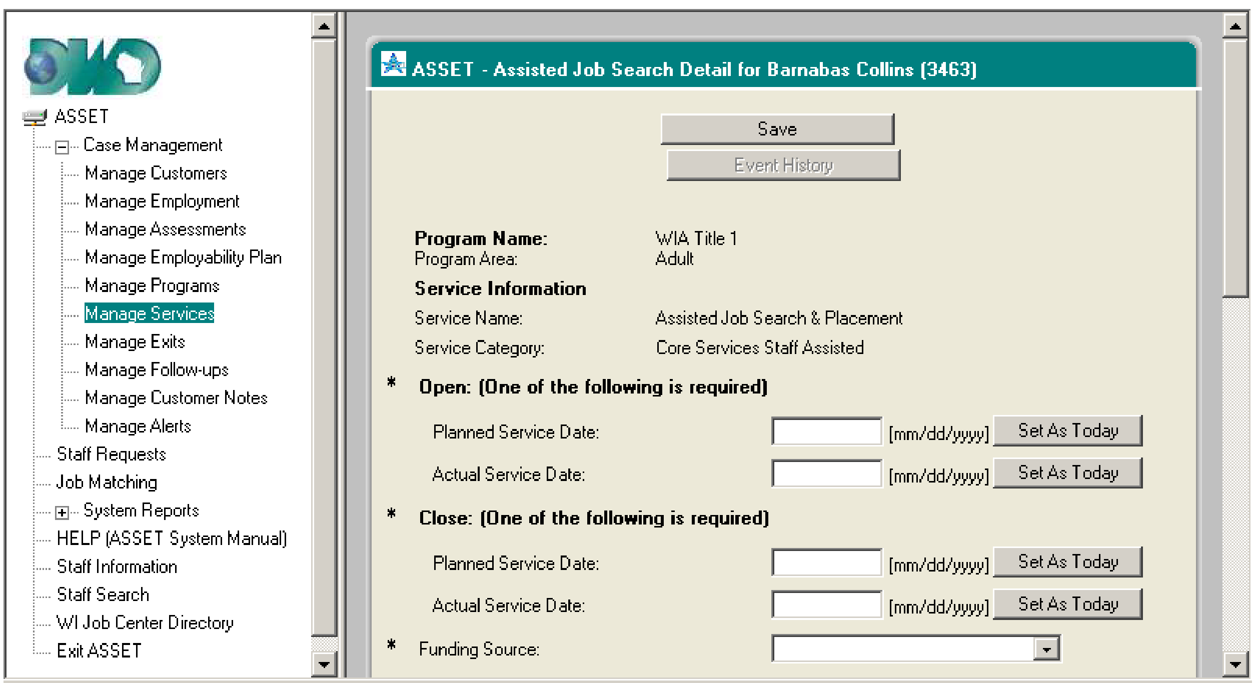
Note: If it is determined that the service to be reported is not in the list of the Service Category selected, use the browser's Back Button. However, the worker is returned to the Service Summary page and must again click on the Add Service button.

The design of the Service Eligibility listing includes the name of the Service and a description. Workers should pay close attention to these definitions, as they have been expanded or re-defined to improve the quality of service reporting.

When the desired service is selected, clicking on the Service's underlined link opens the **Service Detail** page for that service. The Service Detail page consists of two parts – the upper portion is the same for all programs and services and the lower part dynamically changes based on what is entered in the top portion. The upper portion of the page is displayed on the next page. Note that the name of the Service is displayed at the top with the customer name and PIN as well as under the Service Information section.



The service dates entered are very important! The user needs to be aware that only Actual Service Dates (Open and Close) are used in program performance. Any service that has only a Planned Open and Planned Close are never counted as a service that was actually provided. Planned Open dates are just what it implies – a planned service. Until an Actual Open Date is entered, that service is regarded as never having started.

A Note about System Edits on the date fields: The Open and Close Dates may be either Planned or Actual. Workers may use a future date in the Planned Service open date or the Planned Service close date, and may backdate a planned service up to 15 days prior to the system date (today's date), but never before the Program registration date.

The Actual Service Open date also may be backdated up to 15 days, but never before the Program Registration date. Workers are never allowed to enter a future date in the Actual Service Open date field because the Actual Service Open date should be the date the service actually began or the activity was started. Workers cannot know what the Actual Service Close date is unless that day is today or in the past, therefore no future dates are allowed for Actual Close date. Workers may know that a service is planned to close in the future, but cannot know for sure that it actually occurs until that day arrives.

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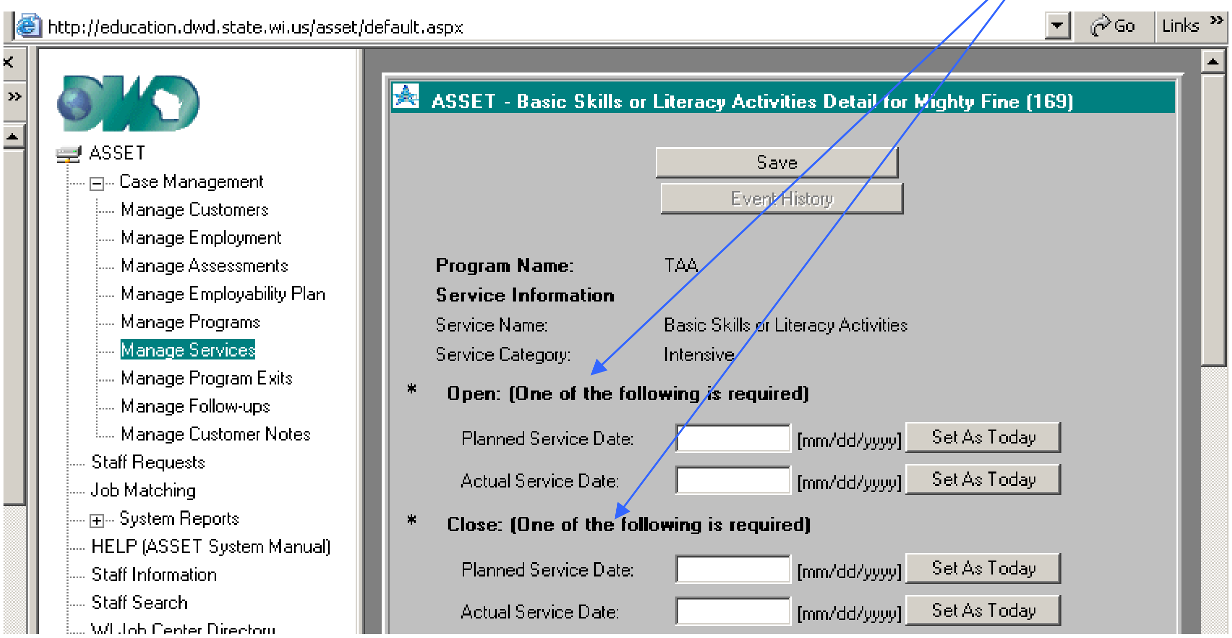
Service Detail Page – Upper Portion
The upper portion of the Service Detail page always displays in the same way. There are two required fields in this portion of the page. The fields on the page include the Open and Close Dates, for both Planned and Actual.



Field Definitions:
The Service Detail page input fields are defined as follows:

FIELD	REQUIRED	DESCRIPTION
• **Open – Planned Service Date**	Yes	The date the activity/service is planned to start.
• **Open – Actual Service Date**	Yes	The date the activity/service is actually started.
• **Close – Planned Service Date**	Yes	The date the activity/service is planned to end.
• **Close Actual Service Date**	Yes	The date the activity/service is actually finished.

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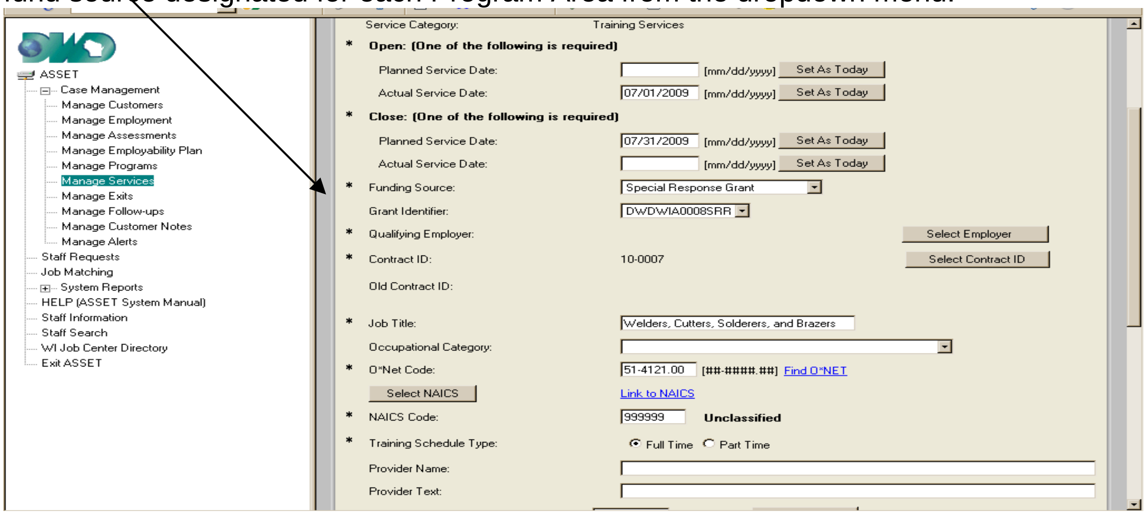
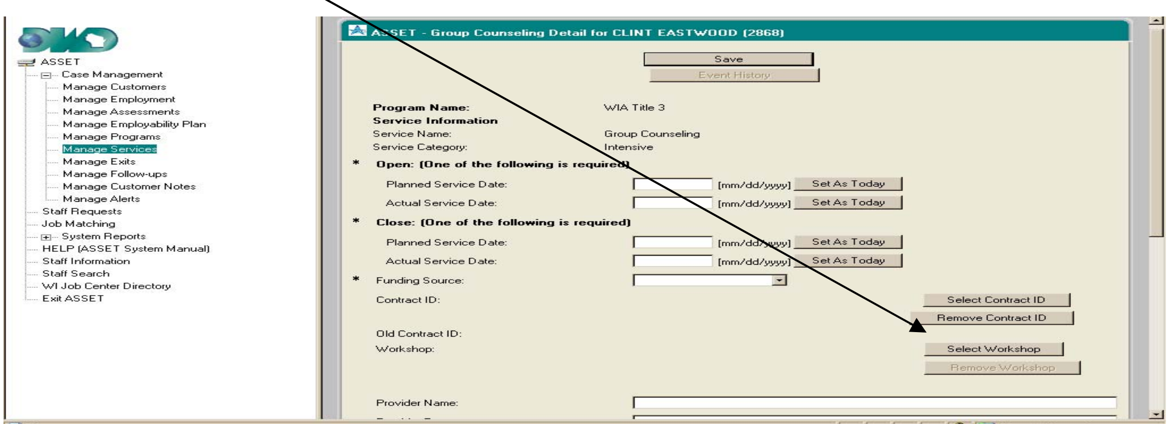
Funding Source is another required field. Workers should ensure that they select the correct fund source designated for each Program Area from the dropdown menu.



A Grant Identifier and Qualifying Employer field appears if the Funding Source is; WIA Title IB Dislocated Worker, Special Response, or National Emergency Grant, or Statewide Set Aside. Or, if the Funding Source chosen is Special Programs. They are designated (*) as required fields and are entered by Central Office staff.

The Select Workshop button is used to schedule a customer to attend a specific workshop. Click on the Select Workshop button.



The page displayed looks like this:

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There are 5 WIA Title 3 services that can be used to schedule the customer to attend specific Workshops. The services are: Group Counseling, Keytrain Workshop, Workkeys-Locating Information Assessment , Workkeys-Math Assessment, and Workkeys-Reading Assessment.

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The Field Descriptions are:

FIELD	REQUIRED	FIELD DESCRIPTION
• **Funding Source**	Yes	Identifies the source of funding that pays for the specific service being provided.
• **Grant Identifier**	Yes for Dislocated Worker and Special Program's	This field has a cross-edit with the Funding Sources. Here's how it works. If Special Response Grant is the Funding Source, only SRR and STW grants are available in the Grant Identifier field. If National Emergency Grant (NEG) is the chosen Funding Source, only NEG grants are available in the Grant Identifier field. If Special Programs is the chosen fund source then a pre-entered Grant ID is available. This field requires a response in order to save the page. Only area's with an approved grant ID will be able to complete the service.
• **Qualifying Employer**	Yes for Dislocated Worker	The name of the Employer that the participant was dislocated from.
• **Contract ID** (Select Contract ID)	Yes	Tab with pop-up window that lists available Contract number given for approved grants for a WDA.
• **Old Contract ID**	No	Display-only field. Former Contract ID
• **Select Workshop**	No	Identifies workshops and used for customer scheduling. Once Saved the Remove Workshop button is available and can be used to cancel/delete from workshop.
• **Provider Name**	No	The name of the agency that is providing the service.

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FIELD	REQUIRED	FIELD DESCRIPTION
• **Provider Text**	No	Information related to the service provider.
• **Remove Contract ID**	No	Tab that will remove Contract ID information when entered in error.
• **Job Title** (Training Services Only)	Yes	Name of the job or occupation the customer is receiving training under.
• **Occupational Category** (Training Services Only)	Yes	Select the Occupational Category that corresponds to the Job Title.
• **O'NET Code** (Training Services Only)	Yes	The O*NET code is system generated once the occupational category is selected. A worker can click the Link to O'NET to access additional codes if preferred.
• **NAICS**	Yes/No	The NAICS code is system generated when a worker clicks on the Link to NAICS . A response is required when the service type selected is a Training Service.
• **Training Schedule Type**	Yes	Select whether the training is either part or full time training.
• **Provider Name**	No	The name of the agency that is providing the service.
• **Provider Text**	No	Information related to the service provider.

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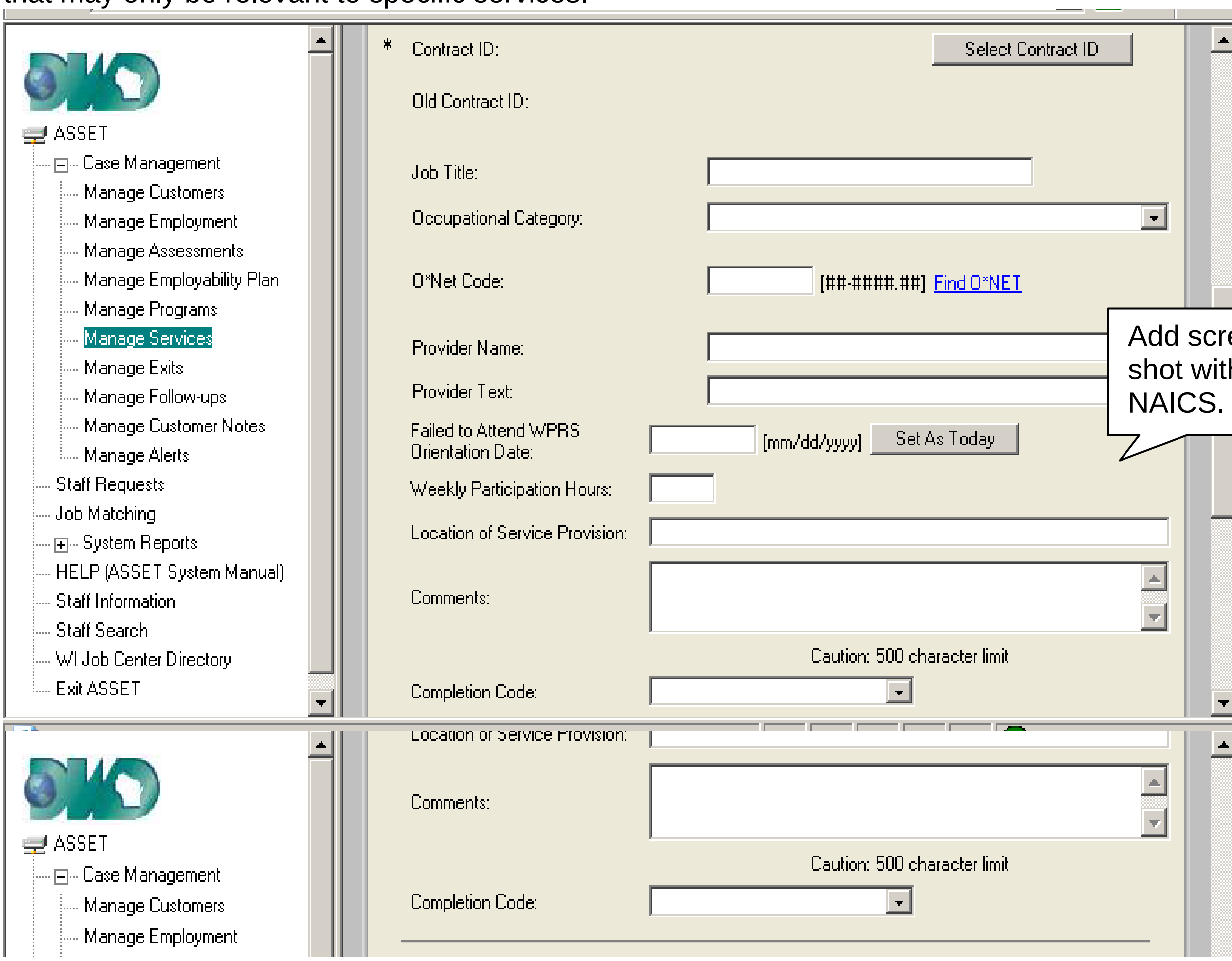
Service Detail Page – Middle Section
The middle section of the Service Detail page also displays for every service, but contains fields that may only be relevant to specific services.



Add screen shot with NAICS.

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FIELD	REQUIRED	FIELD DESCRIPTION
• **Failed to Attend WPRS Orientation Date:**	No	The date the individual failed to attend his/her WPRS Orientation.
• **Weekly Participation Hours**	No	Text field – an estimate of the time commitment the customer should expect for that activity.
• **Location of Service Provision**	No	Text field – Gives the Case Manager a place to put an address, room number or other information that will assist in directing the customer to the right location.
• **Comments**	No	Text field – Provides the customer with additional information or instructions.
• **Referred to FCJL Job (Vets Only)**	Yes	Radio button – Identifies if the employer is listed on the Federal Contractor Job Listing
• **Referred to Federal Job**	Yes	Radio button – Identifies if the customer was referred to a Federal job.
• **Completion Code**	Yes	Dropdown – Status of a Service at completion.

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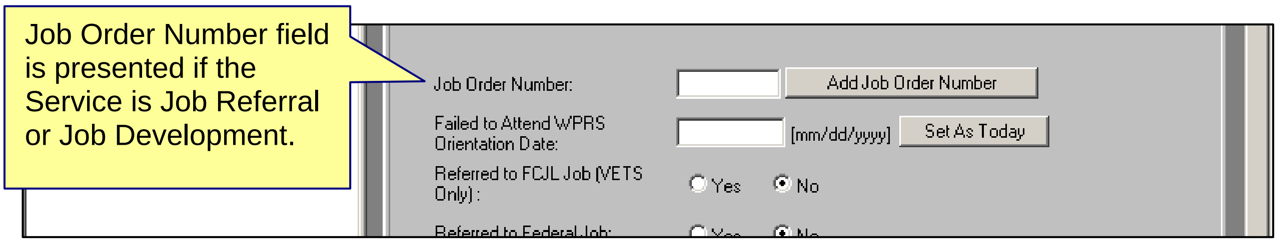
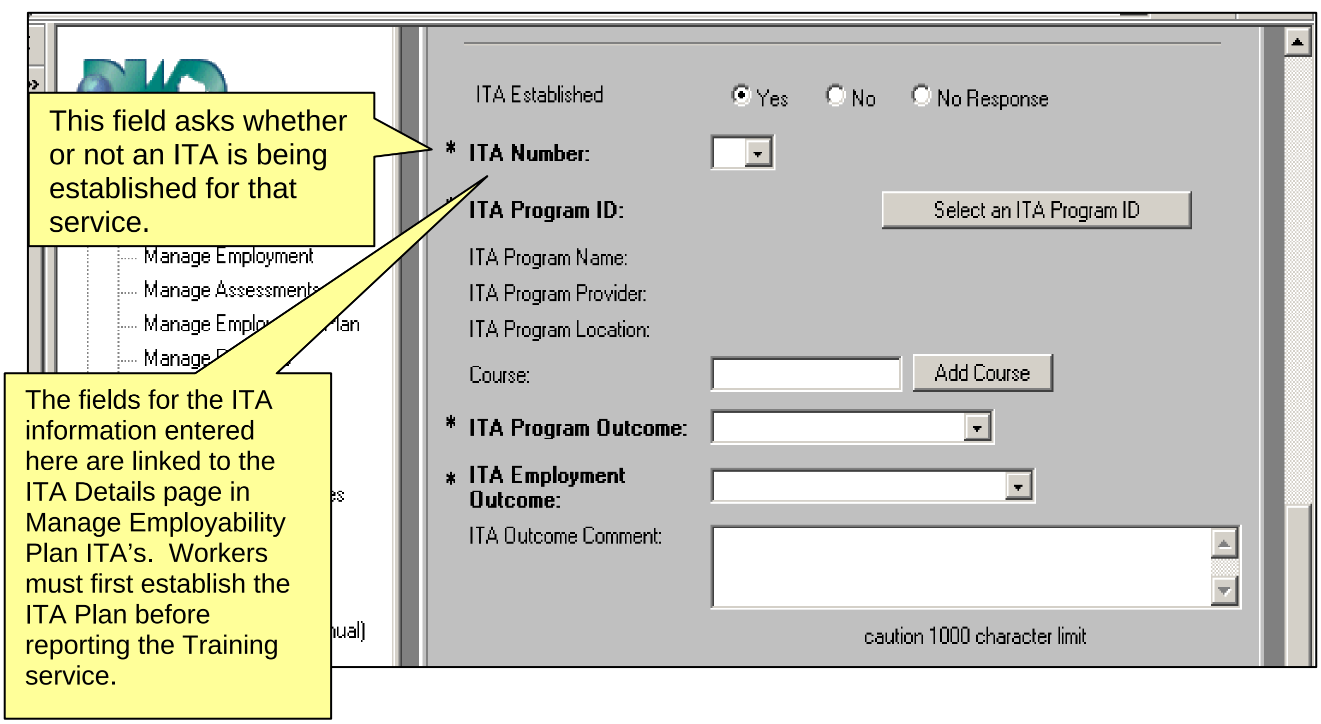
Service Detail – Lower Portion
The lower portion of the Service Detail page will vary in structure and data fields depending upon the information entered in the upper portion of the page or the type of service being reported. The lower portion of the Service Detail may include the following fields:



Note: Multiple referrals may be reported by entering the order number and clicking on Add Job Order Number for each referral. Once saved, multiple services are recorded.

When the service being reported is training-related, the following questions are presented.



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If the ITA Established response is yes, the page refreshes and the other fields related to the ITA appear.

Select an ITA Program ID from the list of Eligible Training Providers by clicking on the Select an ITA Program ID button. This information is organized by WDA. Once selected, the ITA Program ID, Name, Provider and Location automatically display.

Workers have the option of listing the course or courses that are being covered by the ITA. This is a text field that is entered for each course. Clicking on the Add Course button displays the course and opens the field for addition of another course.

The ITA Program Outcome and ITA Employment Outcome fields are required. There are options in the dropdowns to indicate that the person is pending these outcomes if not yet completed with the training. When the Training service is completed, the worker should remember to change the status on this page from Pending to reflect the appropriate outcome.

The fields on the ITA part are defined as follows:

FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Number**	Yes	The worker must select the ITA number from the dropdown. The numbers available are those already established on the Manage Employability Plan – ITA Tracking Overview tab.
• **ITA Program ID**	Yes	This dropdown is a list of all approved Training Programs on the Eligible Training Provider List. The list is sorted by the WDA (the first two numbers of the course). The WDA number is the one that approved the specific course as eligible for ITAs. The same course may be listed more than once (under each WDA that approved it). Because customers may opt to attend Training Programs outside of the WDA in which they live, workers may have to search this listing for the appropriate course number under that target site WDA. For out-of-state providers, users may need to contact DET for assistance.

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FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Name** • **ITA Provider** • **ITA Location**	N/A	These fields fill automatically based on the ITA Program selected.
• **Course**	No	The worker may list the specific courses within the Training Program that this customer will take. It may be important if the ITA covers only a portion of the courses offered under a comprehensive Training Program. Customers can be given a printed copy to clearly show the specific courses to be paid via the ITA.
• **ITA Program Outcome**	Yes	The worker must enter the appropriate response. • **Pending** means the customer has not yet started or currently is in the training program • **Not Completed – Failed** means the customer could not complete the level of work in the training and received a failing grade • **Not Completed – Dropped Out** means the customer did not complete the entire course • **Completed** means the customer finished the Training Program or the goals of the Employability Plan for the training. • **ITA Withdrawn** Only the Completed outcomes will be used for evaluation of the Training Program.

FIELD NAME	REQUIRED	DESCRIPTION
• **ITA Employment Outcome**	Yes	The worker must complete the appropriate response: • **Pending** means the customer has not yet started or currently is in the training program • **Employment – Training Related** means that the participant has obtained a job related to the training program • **Employment – Not Training Related** means the participant has obtained a job but in an occupation not related to the employment • **No Employment** means that the participant has not found employment. The responses in this field will be used to evaluate Training Programs for future eligibility as an Eligible Training Provider. **Workers should change this response if the customer later obtains work that is training related.**
• **ITA Outcome Comments**	No	Text field for narrative comments regarding the outcomes shown.
• **By Block**	Yes	The By Block is common to all ASSET pages and includes Case Manager, Staff Type, Office Code and WDA. These items are needed for informational and management purposes.

The By Block portion of the Service Details page is the same as elsewhere in ASSET. Except for a few specific services, workers who have correctly set their Staff Type and Office Code on the Staff Information page will rarely need to enter data in any of the fields on By Block portion of the page.

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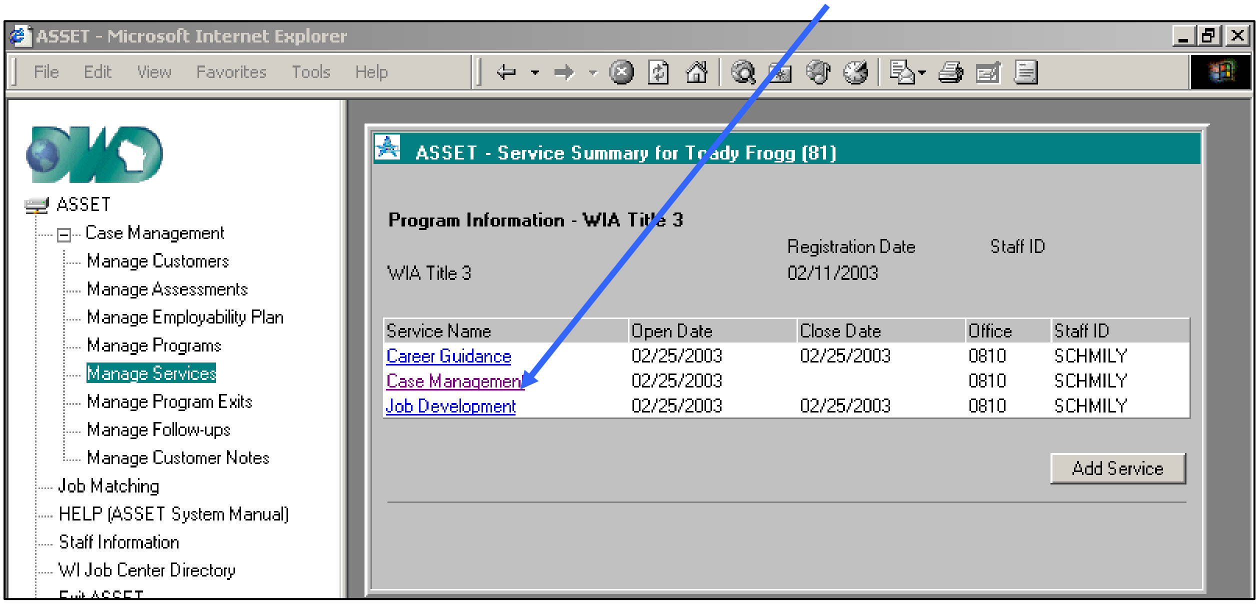
Using Manage Services to update or modify a reported service:
The Manage Service function allows workers to update or modify a reported service only if the Program is still active.

Note: Workers will not be allowed to exit a customer from a Program if there are open services for that Program. Additionally, a customer's Program Area should not be ended if there are open services for that Program Area. Placing an End Date in Manage Programs will prevent you from closing the services. The correct order for closing out a case is Close Services, End Program/Program Area, and finally Exit Program.

To return to the Service Detail page for an existing service (either to modify it or to close the service), the worker needs to click on the Service link on the Service Summary page. In this example, three different services were reported under WIA Title 3. If the worker wanted to end Case Management services for the customer below, a single click on the Case Management service link opens the detail page for that existing service.



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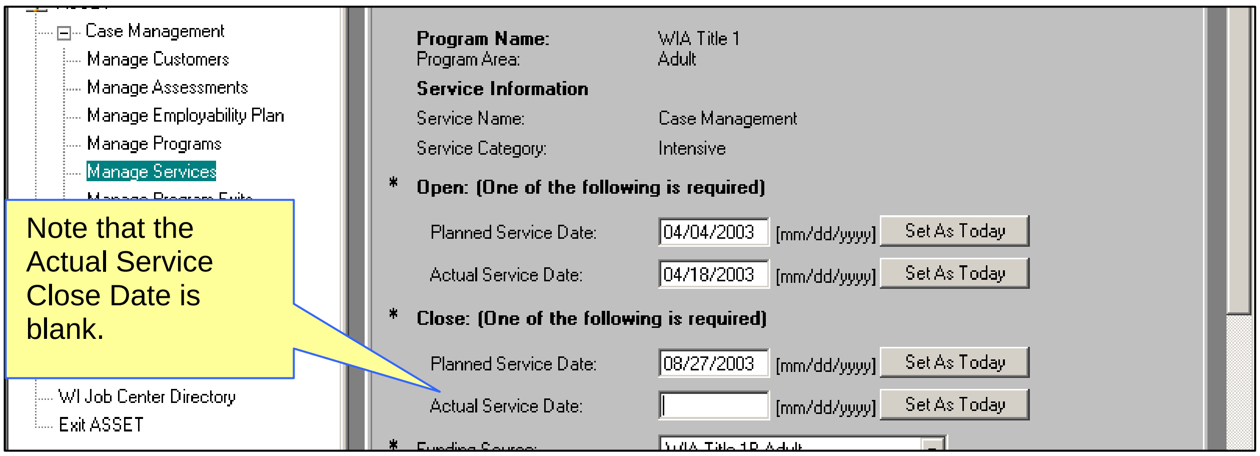
The upper portion of the Service Detail page for the existing Case Management service looks like this:



To close this service, the worker must enter the Actual Service Date in the Close section and click on the SAVE button.

If the worker wished to only change information about the service, such as changing a Funding Source or adding a Provider Name, simply make the change(s) and click on SAVE, and the service is updated.

If the service is to be kept open longer, meaning the Planned Service Close Date is to be extended, just make that change to the date and click on the Save button.

> **Note: There is a system edit that prevents workers from creating a Planned Service Close Date that is more than four years beyond the Actual Service Open Date. In very rare circumstances a service that is kept open continuously for more than four years will require special reporting by ending the first service and opening a new service starting on the same day as the first service ended.**

Using Manage Services to view historical services:
While a customer is in a current period of registration, all reported services are displayed for that Program episode. When a customer is exited from a Program, all the services reported for that Program are moved to a historical point of reference at the bottom of the page. Here's an example of an Exited WIA Title 1 customer, whose services during that period of Program Registration were moved to history.

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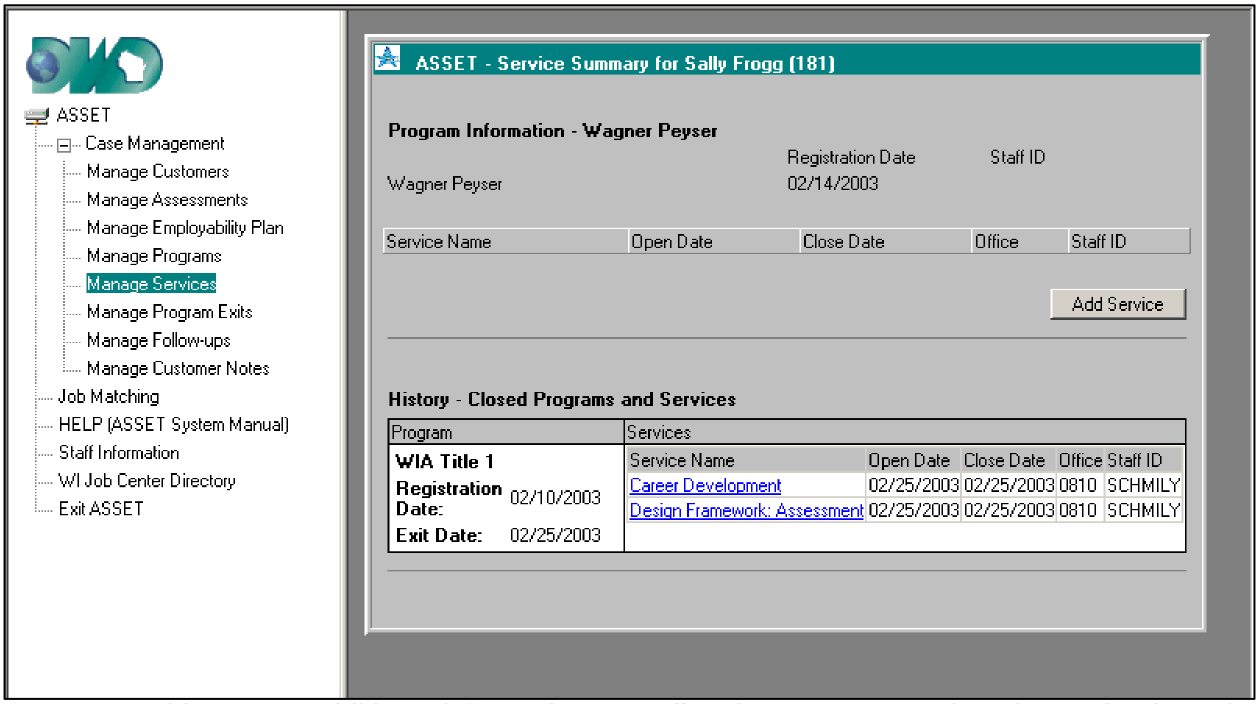

ASSET provides some additional information regarding the Program Registration and Exit, and lists all the services provided during that time period for that Program. Workers may view the services that were reported, but cannot make changes to this information.

To view the services listed in the History - Closed Programs and Services section, the worker needs to click on the Service Name link as indicated above. This will open the Service Details page.

Return to index – Click here