



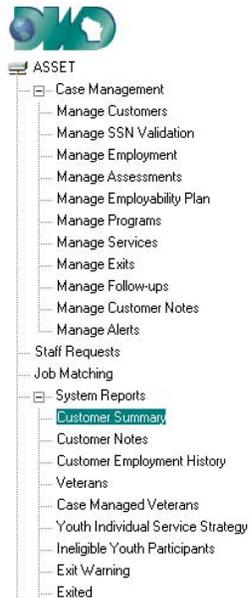
Users' Guide

ASSET SYSTEM REPORTS

5 - 1 _____ CUSTOMER SUMMARY REPORT _____

The **Customer Summary Report** gives workers a summary of a specified customer record. The report is intended to provide workers with a snapshot of all the ASSET information recorded for that customer. Click on the print icon on the browser to print the report.

The report can be accessed by first clicking on the plus sign (+) under Systems Report on the Menu Tree. Next click on the Customer Summary option, then select a customer from the list of Previously Searched for Customers or find a new customer using the Search function.



ASSET - Customer Search

Field:

Operator:

* Criteria:

Previously Searched For Customers:

Last Name	First Name	MI	SSN Validation	SSN	PIN
Drexler	Margaret	C	Pseudo	000-00-0000	967236
Barnes	Ronald	J	Pending	392-54-5095	1039462
Davis	Tiffany	J	Not Processed	397-88-0522	302625
Perry	andrew	m	Not Processed	341-80-1446	959167
Roe	Tom	L	Pseudo	000-00-0000	965761
x	x		Not Processed	145-45-4545	1063026
RISTOW	JAN	L	Verified	397-84-9150	811274
SCHLOTMAN	ANN	M	Verified	399-70-4182	481203

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ASSET - Customer Summary for Dixie Chix (4366)

Customer Information

Name: Chix, Dixie M. **PIN:** 4366 **Office:** 0810

General Information

Assessments

Assessment Name	Create Date	Created By	Updated Date	Updated By
Comprehensive Assessment	08/03/2007	WIEXTACC\ASSETCASEMANAGER	11/13/2007	Conversion

Open Programs

WIA Title 1
Registration Date: 12/18/2006

Program Area	Begin Date	End Date	Office
Adult	12/18/2006		0810
Dislocated	12/18/2006		0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Resume Development	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Eligibility Screening	12/18/2006	12/18/2006	12/18/2006	12/18/2006

ITA Number: 04
Create Date: 07/12/2007

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Occupational Classroom	07/12/2007	08/29/2009	07/12/2007	

ITA Number: 03
Create Date: 12/18/2006

ITA Number: 02
Create Date: 12/18/2006

ITA Number: 01
Create Date: 12/18/2006

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Occupational Classroom	12/18/2006	12/18/2008		

TAA
Registration Date: 12/18/2006 **Registration Office:** 0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Occupational Classroom	12/18/2006	12/18/2008		
Eligibility Screening	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Customer Specific Labor Market information.	12/18/2006	12/18/2006	12/18/2006	12/18/2006

WIA Title 3
Registration Date: 12/18/2006 **Registration Office:** 0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Case Management	12/18/2006	12/18/2007		
Info on Assessment Services	12/18/2006	12/18/2006	12/18/2006	12/18/2006
Job Development	12/18/2006	12/18/2006	12/18/2006	12/18/2006



- ASSET
- Case Management
 - Manage Customers
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<ul style="list-style-type: none">... Veterans... Case Managed Veterans... Youth Individual Service Strategy... Ineligible Youth Participants... Exit Warning... Exited... Case Managed DOC/CDP... Case Load... Employment Plan	<table border="1"><thead><tr><th colspan="2">Exited Programs</th></tr></thead><tbody><tr><td>WIA Title 3</td><td></td></tr><tr><td>Registration Date: 07/31/2006</td><td>Registration Office: 0810</td></tr><tr><td>Exit Date: 08/15/2006</td><td></td></tr><tr><td colspan="2">Follow-Up Status</td></tr><tr><td>Program Name</td><td>Exit Date</td></tr><tr><td>WIA Title 3</td><td>08/15/2006</td></tr></tbody></table>	Exited Programs		WIA Title 3		Registration Date: 07/31/2006	Registration Office: 0810	Exit Date: 08/15/2006		Follow-Up Status		Program Name	Exit Date	WIA Title 3	08/15/2006
Exited Programs															
WIA Title 3															
Registration Date: 07/31/2006	Registration Office: 0810														
Exit Date: 08/15/2006															
Follow-Up Status															
Program Name	Exit Date														
WIA Title 3	08/15/2006														

Once the customer is selected, the **Customer Summary Report** displays for that person. The Customer Summary includes four sections:

1. Customer Information – Name, PIN and Office Number of the Customer Record
2. General Information – Includes information that would display on the following menu functions:
 - Manage Assessments - Comprehensive Assessment
 - Manage Employability Plans – Youth Skill Attainment and Individual Training Accounts
3. Open Programs – Includes information for each of the Programs – WIA Title 1, WIA
4. Exited Programs – Includes information for Title 3 and TAA and the list of services that were provided under each program, each exited program and the services associated with each.

The page is dynamically created for each person and what appears on the page depends on what is recorded in ASSET. Below is a sample of Customer Summary page with only Assessment and Youth Skill Attainments in the General Information section:

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The screenshot displays the ASSET system interface for a Customer Summary report. The left-hand navigation menu includes options such as Case Management, Job Matching, System Reports (with Customer Summary selected), Customer Notes, Veterans, Youth Individual Service Strategy, Soft Exit Warning, Soft Exited, HELP (ASSET System Manual), Staff Information, WI Job Center Directory, Exit ASSET, Administration Tools, and ITA Administration Tools. The main content area is titled "ASSET - Customer Summary for Kermit Frogg (581)" and contains the following sections:

- Customer Information**
Name: Frogg, Kermit T. PIN: 581 Office: 0810
- General Information**
- Assessments**

Assessment Name	Create Date	Created By	Updated Date	Updated By
Comprehensive Assessment	03/03/2003	SCHMILY		
- Youth Skill Attainment**

Plan Type	Goal Type	Goal Date	Goal Status	Create Date	Created By
Skill Attainment	Basic Skills	03/04/2003	Set, but attainment pending	03/04/2003	SCHMILY
Skill Attainment	Occupational Skills	03/04/2003	Set, but attainment pending	03/04/2003	SCHMILY

In the Open Programs section, each Program is displayed separately and the services reported within that program also are shown. For WIA Title 1, the Registration Date is shown, followed by the Program Area information, including the Office Number listed for that Program Area.



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ASSET - Customer Summary for Tony Tiger (862)

Customer Information

Name: Tiger, Tony a. PIN: 862 Office: 0810

Open Programs

WIA Title 1
Registration Date: 06/25/2003

Program Area	Begin Date	End Date	Office
Adult	06/25/2003		0810

Services

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Initial Assessment			06/25/2003	06/25/2003
Case Management		01/31/2004	06/28/2003	

ITA: 01
Create Date: 06/25/2003

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Skill Upgrading Retraining	06/25/2003	12/31/2003	06/25/2003	06/25/2003

****Note that ITA Services are listed separately.**

The last section of the Customer Summary is for Exited Programs and the services that were provided during that episode of program participation. Here is an example of the Exited Programs Section.



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The screenshot displays the ASSET system interface. On the left is a navigation tree with 'Customer Summary' selected under 'System Reports'. The main window shows the 'Exited Programs' report for WIA Title 1, including registration and exit dates, and a table of program areas. Below that, it shows WIA Title 3 with its registration and exit dates, and a 'Follow-Up Status' table.

Program Area	Begin Date	End Date	Office
Adult	03/10/2001	05/16/2001	0810
Dislocated	03/17/2001	05/16/2001	0810

Service Name	Planned Open Date	Planned Close Date	Actual Open Date	Actual Close Date
Initial Assessment	05/16/2001	03/17/2001	03/17/2001	05/16/2001
Initial Assessment	05/16/2001	05/16/2001	03/18/2001	05/16/2001

Program Name	Program Exit Date
WIA Title 3	06/05/2003

Note that the Exit Date is shown as well as the Registration Date. Follow-Up Status information also displays under the Exit, if one exists.

There are no direct links to the person's record in any of the ASSET functions, although this person will be the first on your list of Previously Selected Customers should you wish to move to another function.

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