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Course Goals

At the end of this session, TrackOne users will be able to:

- Explain common measures
- Describe how new common measures drove creation of the service delivery model
- Recognize how the service delivery model drives the use of the TrackOne system
- Identify the interdependencies between the service delivery model and TrackOne
- Recognize how this new system paradigm impacts the way we “do” case management
- Recognize the Client Services Continuum as a representation of the new flow for the case manager.
- Guide the client through all of the system “touches” across the continuum and understand exactly what to enter at each of those “touch-points” along the continuum.

It is our intention for attendees to be able to step back...see the change that is happening to their organizations...understand what’s driving that change...recognize the relatively small role TrackOne plays in that change and thereby fully grasp the “big picture.”

Unit 1: Introduction

Goal: At the end of this unit, students will be able to describe the purpose for the day's training and will be able to identify the "path" for our session.

Welcome and Introductions

- Who's who?
- Why the "team teach" approach?

Review "Administrivia"

- Schedule for breaks and lunch
- Food rules
- Location of restrooms
- Cell phone/email access

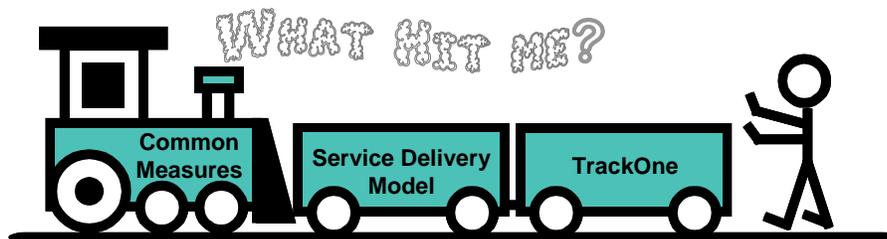
What We Will Accomplish Today

- Help you understand Common Measures, the service delivery model and how TrackOne supports the model.
- Provide a high level overview of the "inter-weaving" of case management with TrackOne
- Clearly identify the places where the system "touches" the client
- Define the steps you take at each of those "touch-points"

Unit 2: What's driving this change?

Goal: At the end of this unit, students will be able to describe, at a conceptual level, common measures, how that drove creation of the service delivery model and how Track One supports the case manager's work within that model. The intention of this "big picture" review is to help students grasp why implementation of this system is so important and how it will benefit them in the long run.

What it Feels Like...The train has arrived



Common Measures and the service delivery model – the theoretical/ conceptual discussion

While Common Measures is driving service integration in order to meet the new performance measures, DWD saw this as an opportunity to eliminate duplication of effort and improve the overall quality of the customers' experiences, hence the development of the service delivery model.

Exactly what is a service delivery model?

The SDM is a performance-driven, functional framework that classifies service delivery functions with respect to how they support performance objectives. An SDM can be siloed, as it is now, or integrated. The goal is to choose the model that is most efficient and best aligned with the performance objectives of Common Measures.

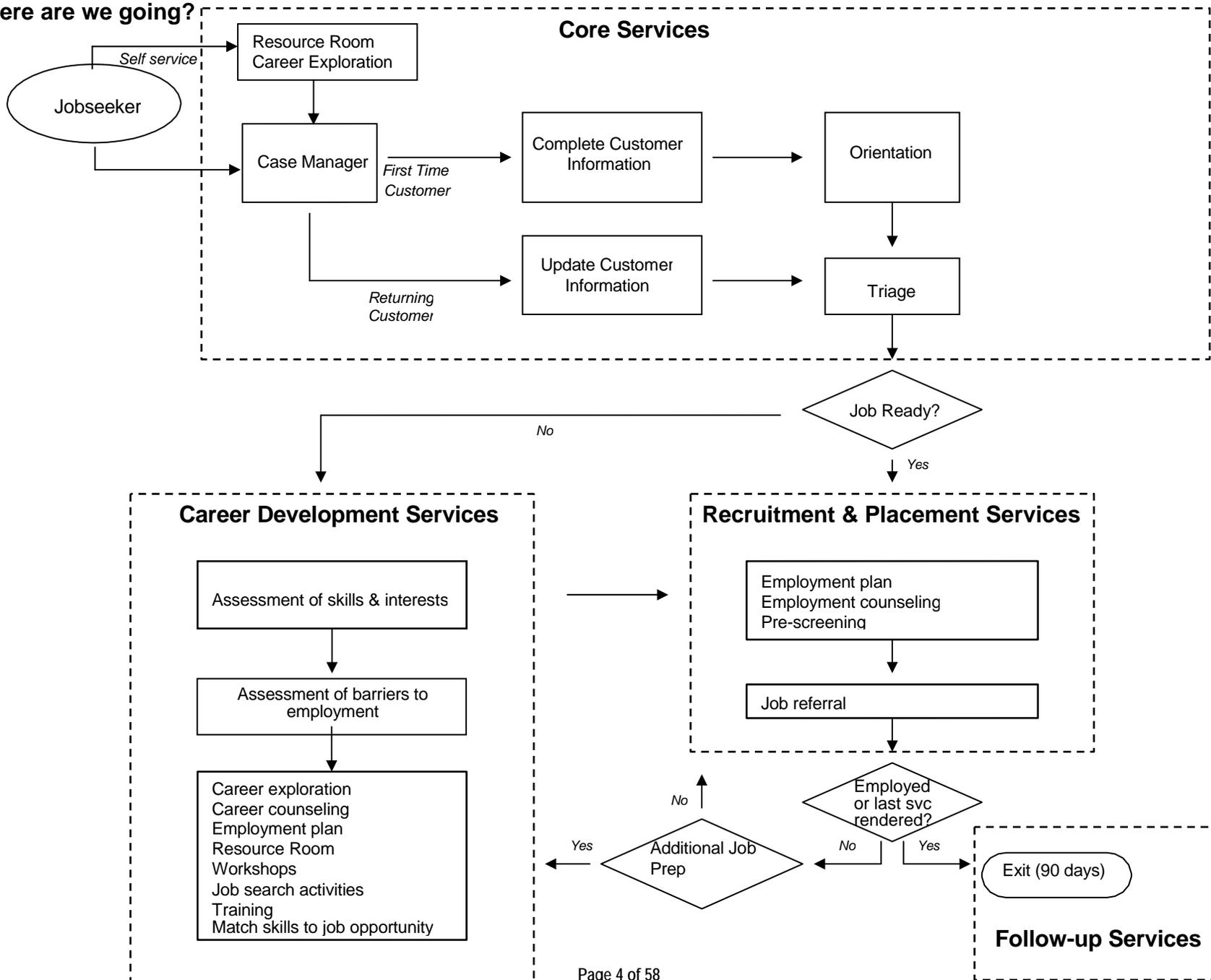
Characteristics of the new model include the following:

- High-quality services and customer satisfaction are paramount.
- Multiple programs have a single tool for customer service and reporting.
- A move towards aligning our policies to support service integration.
- Caseworkers understand the pathways which exist to move customers from one service to another.
- Customers are provided with recommended services to get started quickly.

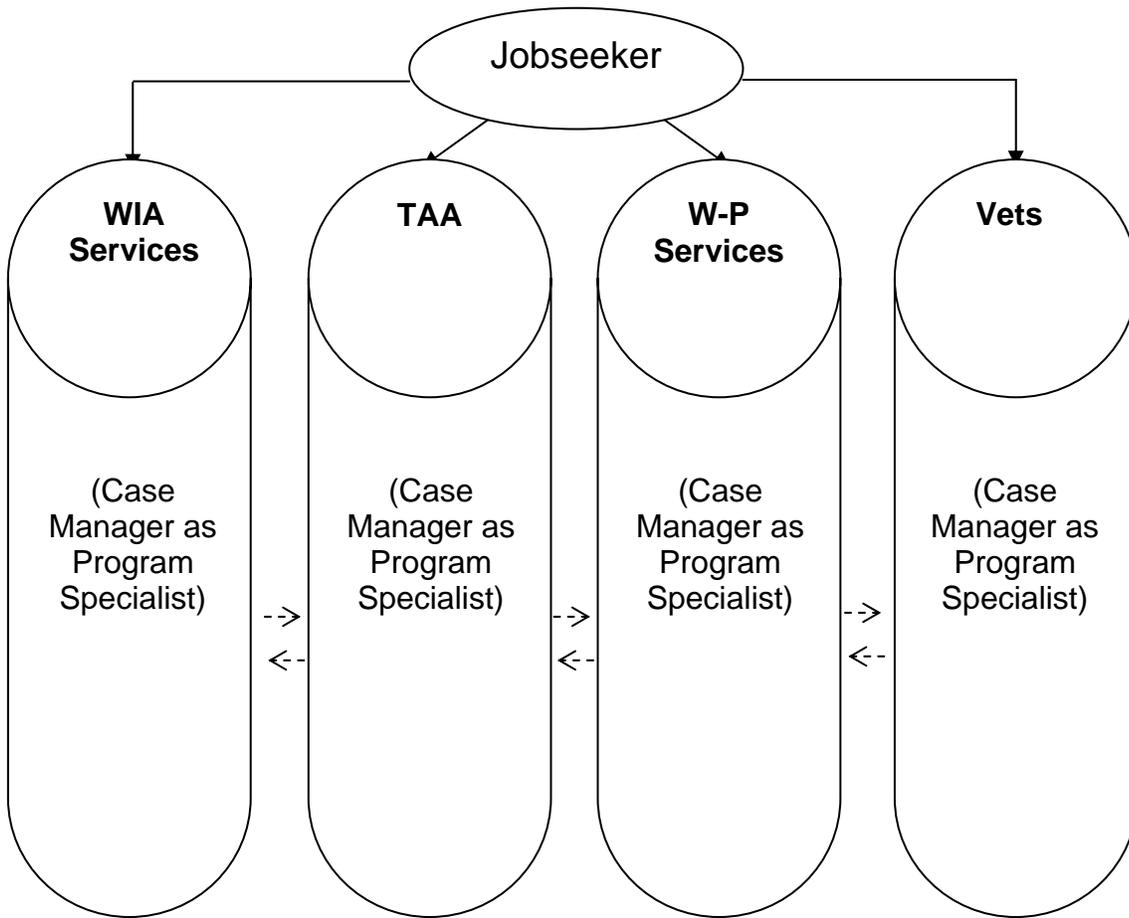
In other words, SDM was the blueprint for development of the TrackOne system. Ultimately:

- The service delivery model is built into the system so compliance is embedded.
- Following the flow of the screens insures you've "done everything right"
- The system allows for reporting using drop-down screens and menus.
- The single system supports a single model for service delivery.

Where are we going?



Where did we come from?



Where are we now?



By now, you should be seeing the paradigm shift – yesterday case managers were program managers, responsible for a program; tomorrow case managers will be responsible for the client experience.

Today, you are neither here nor there, a necessary but uncomfortable transition period between old and new.

Figure 1: What it feels like

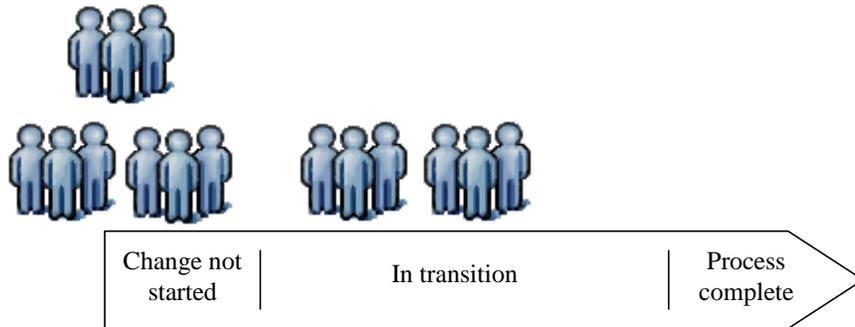


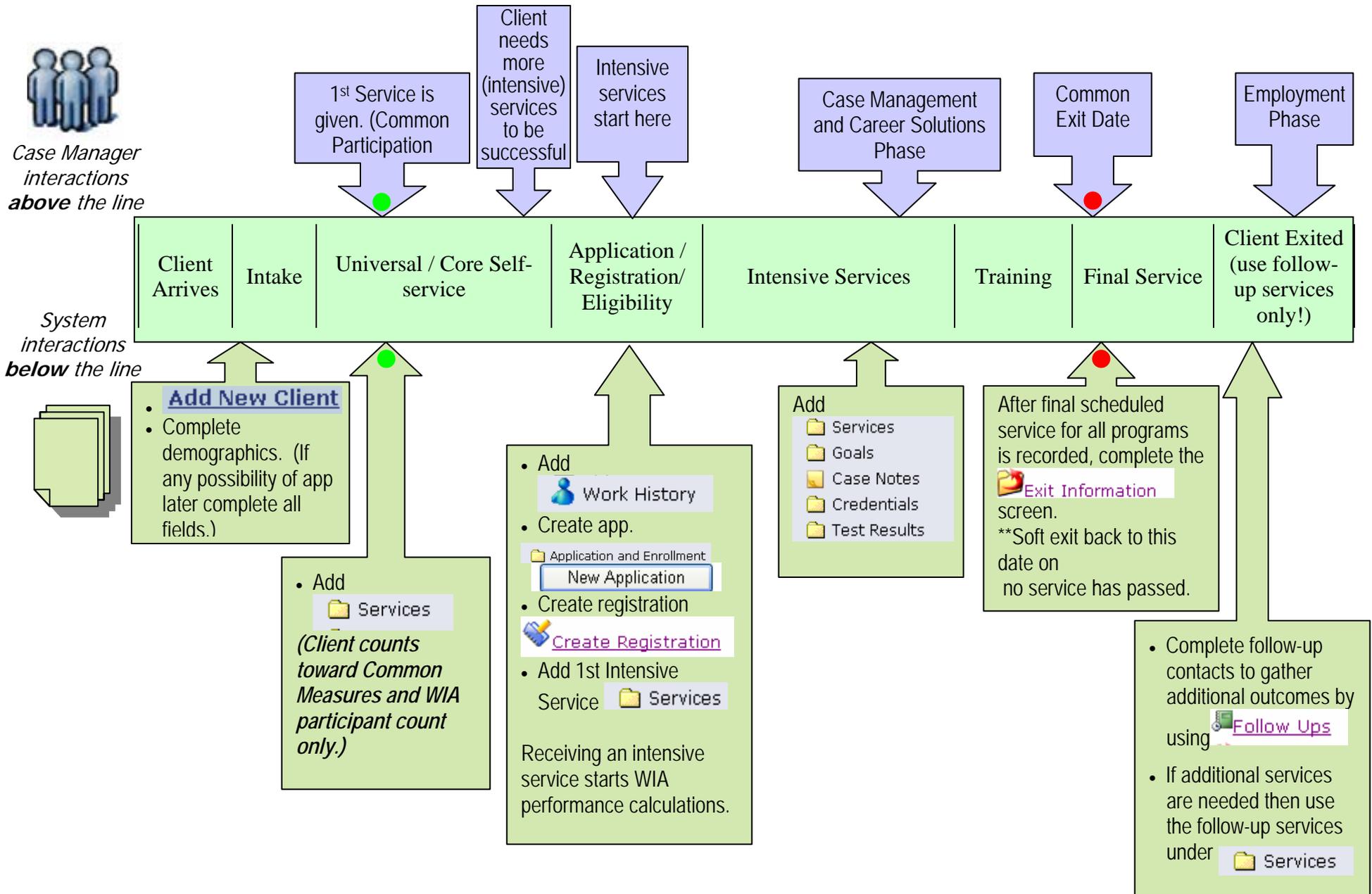
Figure 2: What it is

TrackOne is built to support the “common measures-SDM” paradigm and because that is still in process, everything feels unstable.

From theory to practice – now application

Now, let’s apply this theoretical/conceptual knowledge to the work of a case manager. What does it mean for them in their daily work?

Client Services Continuum



How will this affect our outcomes? – Two Examples

Client Service Continuum Example #1

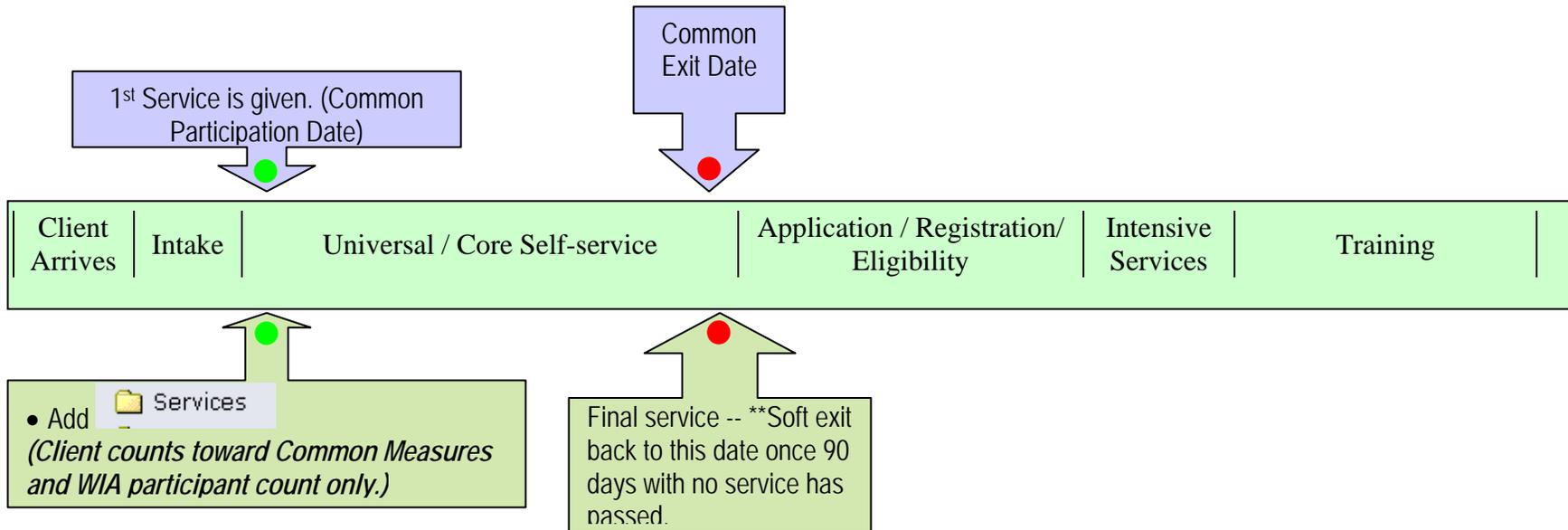
You have an adult client who informs you they've just quit their job. They want to work on their resume and look at whatever job openings you have listed in your office. Referring to the Client Service continuum, enter their information into Track One.

Client Service Continuum Example #2

Another adult client arrives. After a brief conversation, you can anticipate that this client will require significant assistance. Again, referring to the Client Service continuum, enter this client into Track One (through the point of assigning a service and printing an ISS).

Client Services Continuum – Example #1

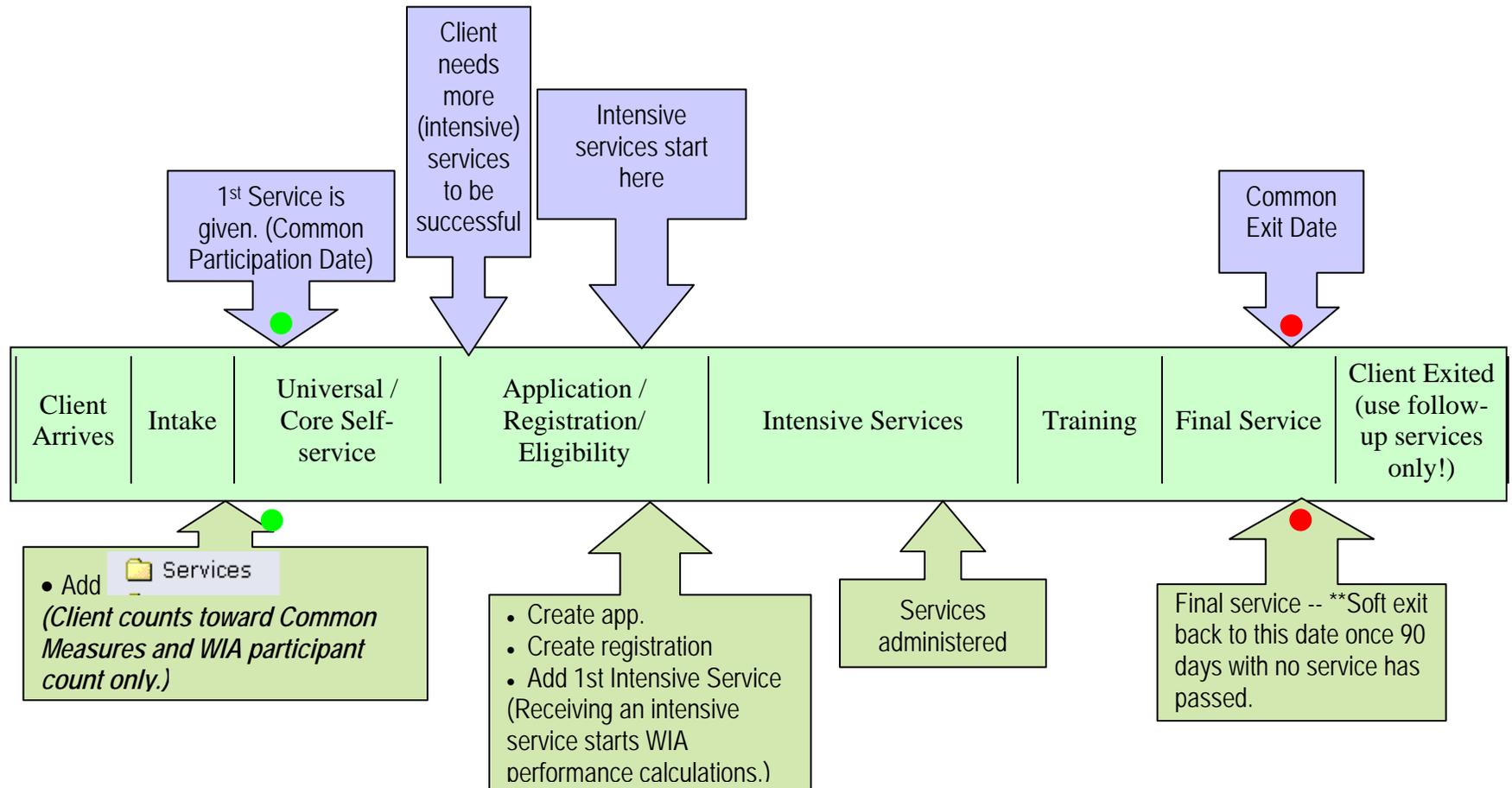
This client would appear in the Common Measures Performance Calculations and the WIA Participant count.



Client's SSN is still run against UI to gather the wage information prior to the common participation date. Client's SSN is run against UI to determine "Entered Employment", wages post program to calculate the average earnings and to determine employment retention. Client will be in the Common Measures performance calculations (entered employment, employment retention, and average earnings.) Client will also show up in the WIA participant counts, but will not appear in the WIA performance calculations.

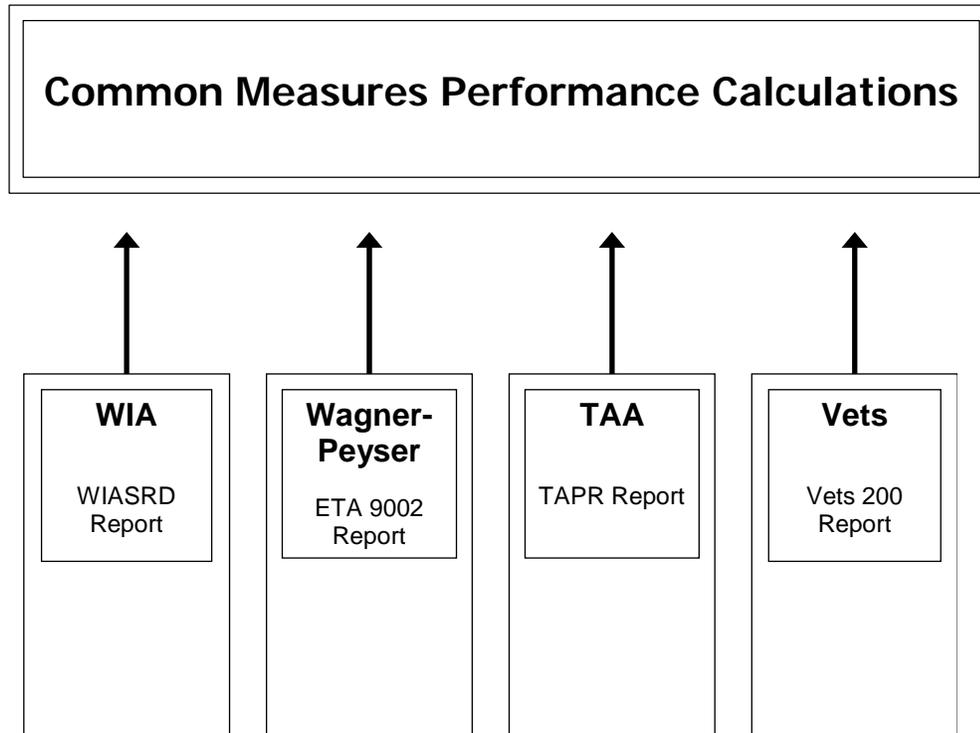
Client Services Continuum – Example #2

This client would appear in the Common Measures *AND* WIA Performance Calculations.



Client's SSN is run against UI to gather the wage information prior to the common participation date. Client's SSN is run against UI to determine "Entered Employment", wages post program to calculate the average earnings and to determine employment retention. The WIA performance calculations mirror the Common Measures performance calculations.

Now let's look at the overall impact to reporting:



Other Documentation on Bridging the Gap

Finally, let's review the documentation that's available to help bridge the gap between where we were and where we are.

Policies Posted on the DWD Website -

<http://www.in.gov/dwd/partners/trackone.html?PageID=1&MenuID=1000000559> (This is also available through TrackOne under Web Links as TrackOne Tech Guidance/Resources)

Posted on TrackOne (Under Important Documents):

- Service List Overview - list of service/activity titles (and how each relates back to old PMIS line codes),
- Service List Detail - "cheat sheet" showing the service/activity title and the category and type to help staff locate the desired service.

<http://www.SPRA.com/PEP> - This excellent website offers free online training on Common Measures funded by the USDOL.

Unit 3: Now the system specifics

Goal: Guide the client through all of the system “touches” across the continuum and understand exactly what to enter at each of those “touch-points” along the continuum.

Follow the Continuum

Scenario 1: Steps for a client in core self-service only

- Find Client – if not there, Add Client
 - This exercise includes adding a new client
 - Fill out the 5 required fields
- Add Service

Scenario 2: Steps for a client needing intensive services

- Find Client/Add new client
 - This exercise includes searching and finding a client
 - Remember the importance of SSN in your search
- Edit Participant
- Work History
- New Application
 - Review Paused Operations
- Create Registration
- Case Manager Assignment
- Goals
- Services
- Case Notes
- Credentials
- Assessment/Test results
- Generate an ISS
- Training Enrollment
 - Accounts
 - Obligations
- Exit Information
- Follow-ups

A couple more things...

- Managing alerts
- What do I need to print and keep for data validation, DWD, DOL?
- Reports available to case managers

Scenarios

The next portion of the class will deal with two scenarios

- Scenario 1 – Core Self-Service only with a new client.
- Scenario 2 – Intensive services for an existing client.

If...	And...	Then...
The client only needs a core service...	The client is not found in the system...	Add basic demographics, then add services.
	The client has a folder in the system...	Add services. This makes them a participant, but they do not count for performance calculations.
The client needs intensive services...	The client was previously exited...	Begin a new application.
	The client has not been exited...	Add services. DO NOT begin a second application. When you add the services and indicate the different funding stream, you initiate the dual enrollment. Important! Each period of participation has one and only one application.

Scenario 1

Find Client

Click the **Find Client** link.

Enter the search criteria, then click the **Search** button.

The screenshot shows the TrackOne web application interface. At the top, the browser address bar displays "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The application header includes the TrackOne logo, the user name "Jean Eisaman - Indy WIA Training", and navigation links for "Help Topics", "About DSI", and "Logout". A secondary navigation bar contains tabs for "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking".

The main content area is titled "Find Client" and contains the following elements:

- Buttons for "Add New Client" and "Find Client".
- A card for a client named "Doe, John David" with contact information: "378-12-8978" and "5/1/1985".
- A search instruction: "Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search."
- Search input fields for: "Last Name:", "First Name:", "Social Security Number:", "Birth Date:" (with a calendar icon), and "Scan Card ID:".
- "Search" and "Cancel" buttons.

The left sidebar is divided into two sections:

- Case Management**: Includes links for Client Home Page, Edit Participant, Address History, Interested Others, Case Managers, Notifications, Demographics Report, Reminders/Tasks, Application and Enrollment, Work History, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms.
- Administration**: Includes Administrative File Review.

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Microsoft Out..., Navigating TrackOne..., http://www.trackone..., https://www.trackon...), and the system clock showing "1:07 PM".

Procedure

Click the **Case Management** tab.

1. At the top of the TrackOne Navigation Panel, click the **Find Client** link.
2. Type in any identifying information, such as **Last Name**, **First Name**, or **Social Security Number**.



Important! Searching by last name has led Case Managers to select the wrong client file. Searching by Social Security Number is the best way, but if you must search by last name, be sure you check the Social Security Number to ensure it matches.

3. Click the **Search** button. If you do not enter any information and click on **Search**, you will get a list of all clients.

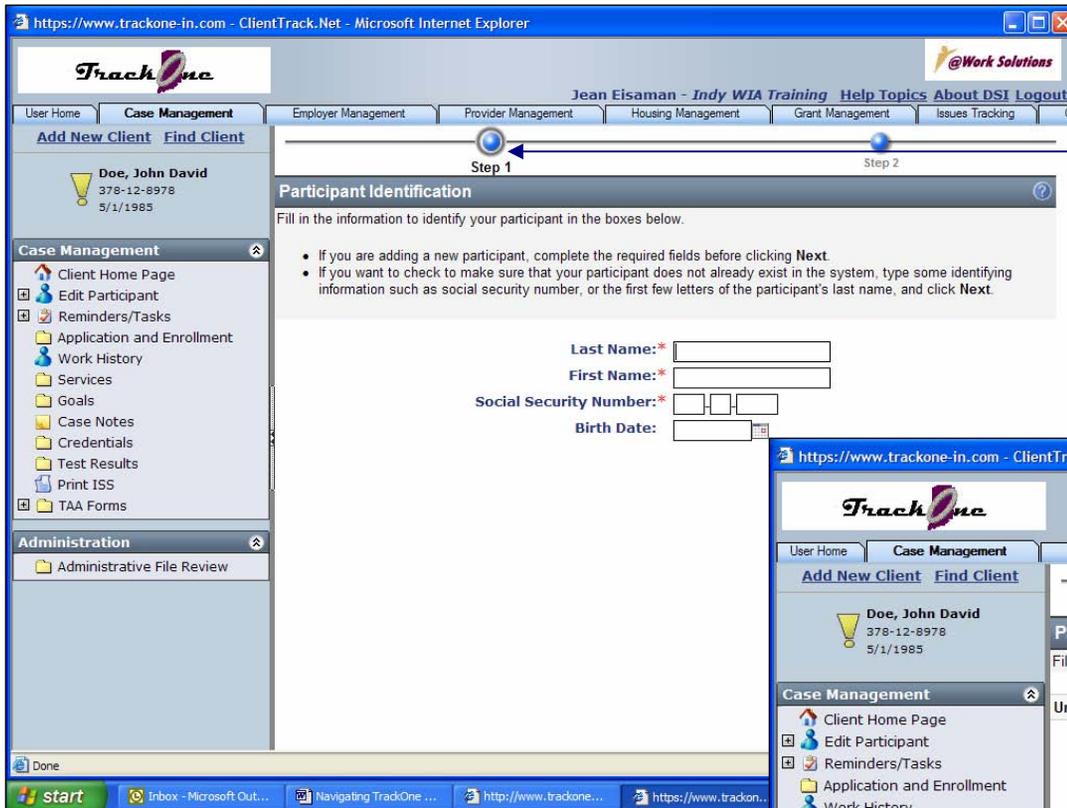


Important! With the client file located, review the participant's information. If there is any more information beyond what was initially captured (at a minimum, the required five fields will have been filled in), you'll want to collect it now.

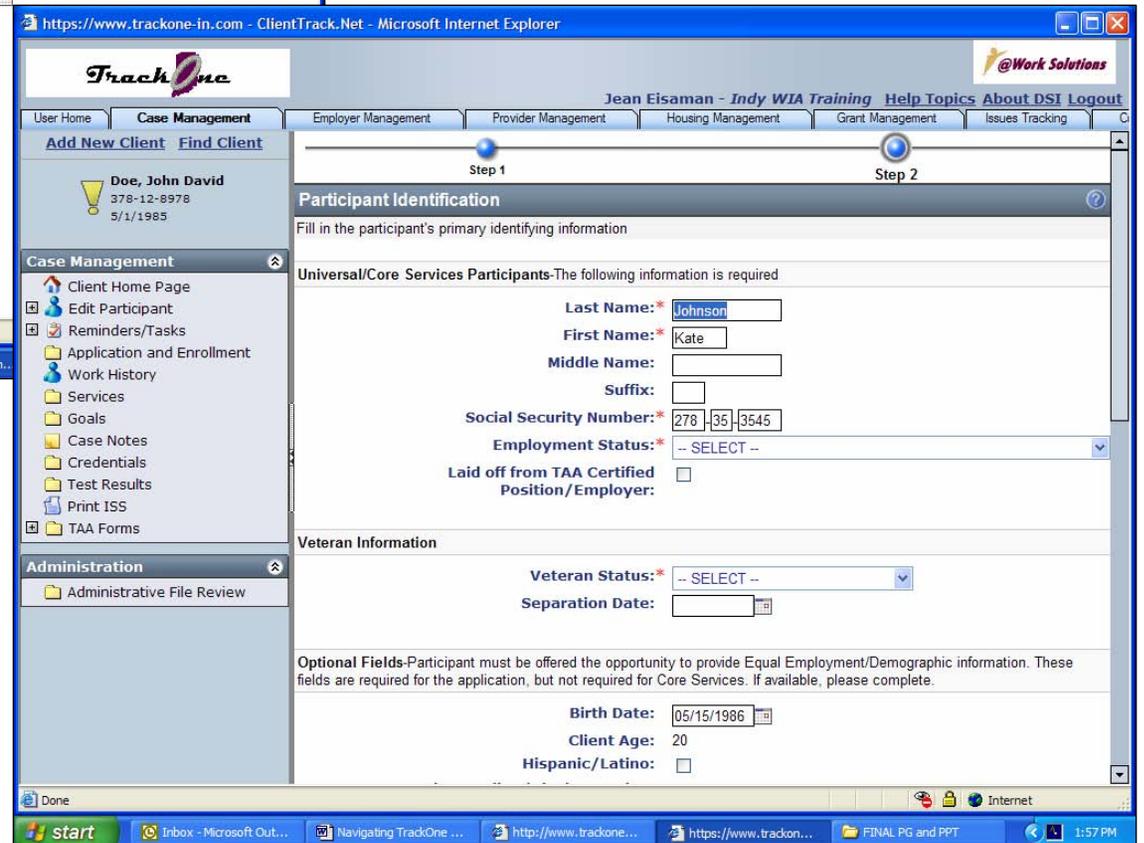
If there is no match by SSN (no client folder already created), you will need to add the client.

Next...Add Client

Add Client



The Step Bar identifies where you are in the continuum





Important! TrackOne is still in transition. The Wagner-Peyser and VETS program will be integrated in to TrackOne in conjunction with the new job matching system. Therefore, in this transition phase, only those clients served by a WIA or TAA funded staff person are to be entered in to TrackOne.

Procedure

1. Click on **Add New Client** at the top of the TrackOne Navigation Panel.
2. Click **Next**.
3. Enter the following required fields (flagged with a * red asterisk)
 - Last Name.
 - First Name.
 - Social Security Number.
4. Click the **Next** button. Enter the final two required fields:
 - Employment Status
 - Veteran Status (If your client is a veteran, TrackOne will apply conditional logic and require additional information.)
5. Click **Finished**.



Think of adding a new client as creating a new file folder for your client, one where all the information regarding him/her is stored. You only need one!

Next...Add Services

Add Services

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Jean Eisaman - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home | **Case Management** | Employer Management | Provider Management | Housing Management | Grant Management | Issues Tracking

[Add New Client](#) [Find Client](#)

Indy WIA Activities-Admin

Activity

To add an activity, enter the following information.

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management

- Client Home Page
- Edit Participant
- Reminders/Tasks
- Application and Enrollment
- Work History
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Begin Date: * 08/18/2006

Service/Activity Title: * Staff-assisted - Job Search

Category: WIA Core

Line Code: CS

Service Type: Staff Assisted Job Search

Provider: Indiana WorkOne System

Funding Stream: * WIA-Adult

Program Enrollment: -- SELECT --

Training Provider ID:

O*Net Code:

Summary Description:

Status: * Active

Planned End Date: * 08/18/2006

Actual End Date:

Record Created By:

Service Notes: A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Procedure

1. Click **Services** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter the Begin Date.
Note: Begin Date, Planned End Date, and Actual End Date should all be the current date.
4. Search the available Service/Activity Title by clicking on the  **Magnifying Glass** to launch the search function.
5. Enter Category by using the drop-down menu.
6. Enter Service Type by using the drop-down menu.
7. Click **Search** to launch the search function.
8. Select the Service and Provider from the generated list. This will auto-fill the Service/Activity Title, Category, Line Code, Service Type and Provider on the Activity Screen.
9. Enter Service Notes.
10. Click **Save**.



Adding the **Core Self Service**:

- Establishes **common participation** date
- Is needed for the **WIASRD** report



Be sure to identify the **funding stream** for the service. If the client is not identified as a dislocated worker (which cannot be established with the five required fields), then the stream should be WIA Adult.

If the person comes in again later and qualifies as a dislocated worker, they'll be dually reported.



This is the last step in entering a self-service/core only client.

Scenario 2

(This page intentionally left blank)

Find Client

Click the **Find Client** link.

Enter the search criteria, then click the **Search** button.

The screenshot shows the TrackOne web application interface. At the top, the browser address bar displays "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The application header includes the TrackOne logo and the user name "Jean Eisaman - Indy WIA Training" with links for "Help Topics", "About DSI", and "Logout". A navigation menu contains tabs for "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking".

The "Case Management" section is active, showing a list of links: "Add New Client" and "Find Client". Below this, a client profile for "Doe, John David" is displayed with contact information: "378-12-8978" and "5/1/1985".

The "Find Client" search form is the central focus. It includes the following fields and instructions:

- Instruction: "Use the section criteria below to find your client. To narrow the search, fill in more than one criteria. Social Security Number and Birth Date are the best fields to narrow your search."
- Form fields: "Last Name:", "First Name:", "Social Security Number:", "Birth Date:" (with a calendar icon), and "Scan Card ID:".
- Buttons: "Search" and "Cancel".

The left sidebar contains a "Case Management" menu with items like "Client Home Page", "Edit Participant", "Address History", "Interested Others", "Case Managers", "Notifications", "Demographics Report", "Reminders/Tasks", "Application and Enrollment", "Work History", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms". Below it is an "Administration" menu with "Administrative File Review".

The Windows taskbar at the bottom shows the Start button, several open applications (Inbox - Microsoft Out..., Navigating TrackOne..., http://www.trackone..., https://www.trackon...), and the system clock showing "1:07 PM".

Procedure

Click the **Case Management** tab.

1. At the top of the TrackOne Navigation Panel, click the **Find Client** link.
2. Type in any identifying information, such as **Last Name, First Name, or Social Security Number**.



Important! Searching by last name has led Case Managers to select the wrong client file. Searching by Social Security Number is the best way, but if you must search by last name, be sure you check the Social Security Number to ensure it matches.

3. Click the **Search** button. If you do not enter any information and click on **Search**, you will get a list of all clients.



Important! With the client file located, review the participant's information. If there is any more information beyond what was initially captured (at a minimum, the required five fields will have been filled in), you'll want to collect it now.

If there is no match by SSN (no client folder already created), you will need to add the client. For purposes of this exercise, we are assuming the client already appears in TrackOne.

Next...Edit Participant

Edit Participant

The screenshot shows the TrackOne web application interface. The browser title is "https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer". The page header includes the TrackOne logo and the user name "Jean Eisaman - Indy WIA Training". The navigation menu includes "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking". The "Case Management" menu is expanded, showing options like "Client Home Page", "Edit Participant", "Address History", "Interested Others", "Case Managers", "Notifications", "Demographics Report", "Reminders/Tasks", "Application and Enrollment", "Work History", "Services", "Goals", "Case Notes", "Credentials", "Test Results", "Print ISS", and "TAA Forms".

The main content area is titled "Participant Identification" and contains the following form fields:

- Universal/Core Services Participants**-The following information is required
- Last Name: * Johnson
- First Name: * Kate
- Middle Name: Marie
- Suffix:
- Social Security Number: * 278-35-3545
- Employment Status: * Not employed
- Laid off from TAA Certified Position/Employer:

The "Veteran Information" section includes:

- Veteran Status: * No
- Separation Date:

The "Optional Fields" section includes:

- Birth Date: 05/15/1986
- Client Age: 20
- Hispanic/Latino:
- American Indian/Alaskan Native:
- Asian:
- Black/African American:

A callout box on the left side of the screen points to the plus sign in the "Reminders/Tasks" menu item, with the text: "The + (plus) sign expands the menu item."

Procedure

1. Click the **+** (plus) next to **Edit Client** or click **Edit Participant** on the TrackOne Navigation Panel to expand the menu options.
2. If you need to update or correct the client's information, click **Edit Client** on the TrackOne Navigation Panel.
3. You may then add any information not gathered when the client was initially added. In other words, at this point, add anything you can get!

The screenshot shows a web browser window displaying the TrackOne Client Demographics Report for a client named Kate Marie Johnson. The report includes personal information, contact details, and demographic data.

Name		Address	
Name	Johnson, Kate Marie	Address	4312 Echo Lane
SSN	278-35-3545		Fort Wayne IN 46825
Gender	Female		
Birthdate	05/15/1986		
Ethnicity		Contact Information	
White	<input checked="" type="checkbox"/>	Home Phone	260-451-5536
Black	<input type="checkbox"/>	Work Phone	260-434-0981
Hispanic	<input type="checkbox"/>	Email	Kate@internet.com
Asian	<input type="checkbox"/>	Demographics	
American Indian	<input type="checkbox"/>	Veteran Status	No
Pacific Islander	<input type="checkbox"/>	Highest Grade	HS Diploma
		Employment Status	Not Employed
		Citizenship	US Citizen

Client Contacts	
Name	Phone

Case Managers		
Case Mgr Name	Begin Date	End Date

To view the client information in printable format, click Demographics Report. The report above is a sample of the Demographics Report.

Next...Work History

Work History (Step 1 of 2) – Search for/Add New Employer

The image displays two overlapping screenshots of a web application interface for adding a new employer. The browser address bar shows the URL: <https://www.trackone-in.com> - Employer Information - Microsoft Internet Explorer.

Top Screenshot (Step 1):

- Progress bar: Step 1 (active), Step 2, Step 3.
- Section: **Employer Information**
- Instruction: Enter the following information to create a new Employer in the system.
- Fields:
 - Employer:*
 - Alternate Employer Name:
 - State Employer ID:
 - Status: Active
- Buttons: Next, Cancel

Bottom Screenshot (Step 2):

- Progress bar: Step 1, Step 2 (active), Step 3.
- Section: **Employer Information**
- Instruction: Enter information about the employer's industry, participation, and how to contact them.
- Fields:
 - SIC Description:
 - Business Description:
 - Tax ID Number:
 - Number of Employees:
 - Level: -- SELECT --
 - Prior Participation:
 - Contact Agency:
 - Contact Person:
 - Contact Phone:
- Buttons: Previous, Finish, Cancel

The Windows taskbar at the bottom shows the Start button and several open applications: Inboxes, Microsoft Word, and the current web browser window.

Procedures

Note: Completing the Work History portion BEFORE the application is important because this pre-fills a portion of the application, eliminating duplicate data entry work for the case manager.

Search for Employer

1. Click **Work History** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter Employer Name and click on the  **Magnifying Glass** to activate the search option.
4. Select the employer from the list. If the employer is not on the list, click **Add New** and follow the steps below.

Add New Employer

1. Enter the Employer name. This is a required field
2. Enter the Status by using the drop-down menu. This field will default to active, which indicates the client's current employer.
3. Click the **Next** button.
4. Complete any additional fields for which you have information.
5. Click the **Finish** button. The Employer Name and Address will auto-populate on the employee record.
6. Click the **Next** button.

Work History (Step 2 of 2) – Job Information

The screenshot shows a web browser window with the URL <https://www.trackone-in.com>. The page title is "ClientTrack.Net - Microsoft Internet Explorer". The TrackOne logo is in the top left, and "@Work Solutions" is in the top right. A navigation bar includes "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking". The "Case Management" tab is active, showing "Add New Client" and "Find Client" links. Below this, client information for "Johnson, Kate Marie" is displayed: "278-35-3545" and "5/15/1986". A sidebar menu lists "Case Management" (with sub-items: Client Home Page, Edit Participant, Reminders/Tasks, Application and Enrollment, Work History, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, TAA Forms) and "Administration" (with sub-item: Administrative File Review). The main content area is titled "Work History - Job Information" and contains the instruction: "Fill in the information below regarding the client's job. The wage information is based on the wage the client was receiving at the time they started the job." The form fields are: "Hourly Wage:*" (text input), "Average Weekly Hours:*" (text input with value "40.00"), "Job Title:" (text input), "Description:" (text input), "Duties/Responsibilities:" (text area), "Job Start Date:*" (calendar input), "Job End Date:" (calendar input), "Reason Left:" (dropdown menu with "-- SELECT --"), "Commission:" (text input), "Classification:*" (dropdown menu with "-- SELECT --"), "Contact Name:" (text input), "Contact Phone:" (text input), "Placement Type:*" (dropdown menu with "Unsubsidized Employment"), "Benefits Available:" (checkbox), "Job Covered by UI:" (dropdown menu with "-- SELECT --"), "O*NET Code:" (text input), "Non-Traditional Employment:" (checkbox), and "Job Related to Training:" (checkbox). At the bottom right of the form are buttons for "Previous", "Finish", "Pause", and "Cancel". The Windows taskbar at the bottom shows the Start button, taskbar icons for "Inbox - Microsoft Out...", "3 Microsoft Word", and the current browser window, along with the system tray showing the time "3:47 PM".

Procedure

1. Enter the following required fields:
 - Hourly Wage the client is currently receiving or was making at the time they left this job.
 - Average Weekly Hours
 - Job Start Date.
 - Classification
 - Placement Type
2. Complete other, non-required fields, if the information is available.
3. Click the **Finish** button.

Next...New Application

New Application

TrackOne Application and Enrollment

Step 1 Step 2 Step 3 Step 4 Step 5

Application - Basic Client Information

Note: Please make sure the client's Work History information is up-to-date BEFORE filling out the Application. To review the Work History, select Work History from the Case Management Menu.

Application Date: 08/18/2006
Planned Exit Date:

Applicant Information-Identify the following basic information about the applicant. If these values are incorrect, click on the edit client record to update

Name: Johnson, Kate Marie
Address: 4312 Echo Lane
Zip Code: 46825
City: Fort Wayne
State: IN
Home Phone: 260-451-5536
Birthdate: 5/15/1986
Documented By: -- SELECT --
Gender: Female
Social Security Number: 278-35-3545
Documented By: -- SELECT --
Citizenship: U.S. Citizen
Documented By: -- SELECT --
Hispanic/Latino:

TrackOne Application and Enrollment

Step 1 Step 2 Step 3 Step 4 Step 5

Application - Employment Information

Click on the Most Recent Job History search icon to select the current or most recent job held (and make sure the client's Work History is up to date). If applying for Dislocated Worker status, select the qualifying category from the Dislocated Worker drop-down list.

Employment/Dislocation Information-Click on the Most Recent Job History search icon to select the current or most recent job held (and make sure the client's Work History is up to date). If applying for Dislocated Worker status, select the qualifying category from the Dislocated Worker drop-down list.

Most Recent Job History: -- SELECT --
Current Employment Status: Not employed
Dislocated Worker Category: Not Applicable (Not Eligible for Dislocated Worker)
 Terminated/Laid Off, Unlikely to Return to Previous Occupation
 Received Notice of Substantial Layoff/Plant Closure
 Was Self-Employed, Lost Work Due to Economic Conditions/Disaster
 Displaced Homemaker
Unemployment Insurance: -- SELECT --
Weeks Unemployed:
Displaced Homemaker:
Referred - Worker Profiling & Reemployment Service:
Union Membership:
Union Callback Rights:

Previous Next Pause Cancel

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Jean Eisaman - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home | **Case Management** | Employer Management | Provider Management | Housing Management | Grant Management | Issues Tracking

[Add New Client](#) [Find Client](#)

Johnson, Kate Marie
278-35-3545
5/15/1986

TrackOne Application and Enrollment

Step 1 Step 2 **Step 3** Step 4 Step 5

Application - Other Client Information ?

Please complete the following information

Family Information-Please complete the following information.

Family Status: -- SELECT --

Number In Family:

Number Of Dependents:

Family Income for previous 6 Months:

Low Income:

Food Stamps: -- SELECT --

TANF:

General Assistance:

Refugee Cash Assistance:

SSI-SVA Title XVI:

Education Information-Please identify the level of the client's education by completing the following information

Education Status: * -- SELECT --

Highest Grade Completed: * HS Diploma

Reading Grade Level:

Math Grade Level:

Done Internet

start | [Inbox - Microsoft Out...](#) | [Navigating TrackOne ...](#) | [http://www.trackone...](#) | [https://www.trackon...](#) | 5:21 PM

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Crystal Johnson - Indy WIA Training Help Topics About DSI Logout

User Home Case Management

Add New Client Find Client

Bell, Danny
371-23-3196
7/29/1969

Case Management

- Client Home Page
- Edit Participant
- Reminders/Tasks
- Application and Enrollment
- Work History
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Step 1 Step 2 Step 3 Step 4 Step 5

Application - Barriers

Please indicate any barriers the client may have.

Disabled:* Yes, Not Substantial Barrier No

Limited English:

Substance Abuse:

Homeless:

Poor Work History:

TANF Exhaustee:

Basic Skill Deficient:

Offender:

Pregnant/Parent Youth:

Youth-Needs Assistance:

Runaway:

Foster Child:

High School Dropout:

Eligible for Free School Lunch:

Locally Defined Barrier:

Local Barrier Description:

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Crystal Johnson - Indy WIA Training Help Topics About DSI Logout

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- Administrative File Review

Step 1 Step 2 Step 3 Step 4 Step 5

Application - Eligibility

The applicants eligibility is displayed below based on calculations from the application.

A - Adult:

D - Dislocated Worker:

F - Youth (14 - 18):

G - Youth (19 - 21):

I - Youth (14 - 18) 5 Percent Window:

J - Youth (19 - 21) 5 Percent Window:

Reviewer Information-Please select the interviewer and reviewer

Interviewer:

Interview Date:

Reviewer:



Important! The tasks and steps associated with the application process are considered the **first intensive service**. This is because an initial assessment of barriers and strengths is required. An intensive service needs to be recorded. DWD recommends that you use “1-on-1 Counseling and Career Planning.” This service places the client into the WIA **performance calculations**.

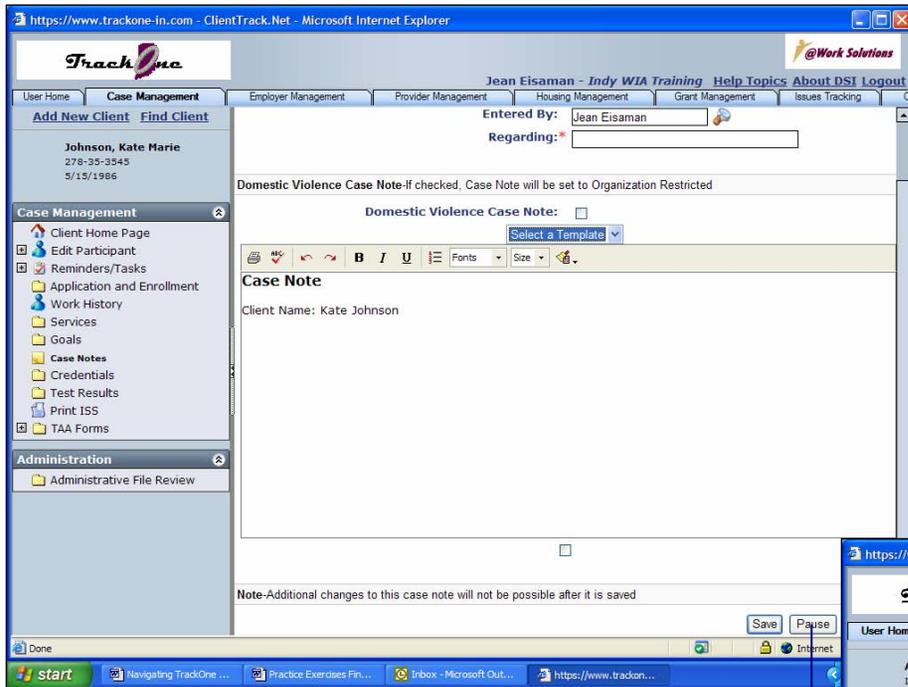
Note the importance of the integration of programs. This is not a program-specific application; it is a common measures application. It is also an opportunity to provide your client with the best of all relevant services and not be tied to only those available under a particular program.

Remember, there should only be **one** active application in the system for the client (because it is a common measures application and spans the programs available). If you find an active application for the client, go straight to adding services.

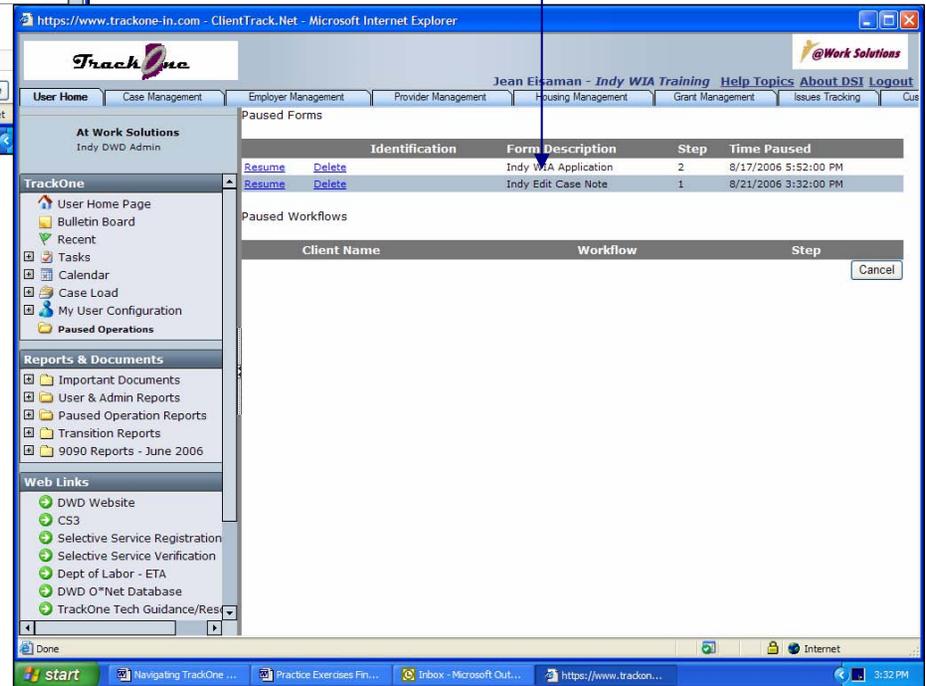
IF the client is dual enrolled and case managers/client files are not co-located, you will need to gather the required documentation for your program file to keep in your office. You can print a copy of the application already taken.

Next...Create Registration.
But first we're going to “pause” the continuum

Paused Operations



Paused Operation List



Let's pause briefly in our scenario to practice the Pause Operations function.

- The **Pause** function is an option on most TrackOne data entry functions.
- If you get interrupted, need to gather additional information, or need to review information before committing it to the client record use the **Pause** button.
- If you use the Pause function, be sure to review your Paused Operations regularly.

Procedures

To Pause an Operation

Click the Pause button.

To Resume an Operation

1. To find your Paused Operations, go to the **User Home** tab.
2. Click **Paused Operations** on the **TrackOne** section of the navigation panel.
3. Select the operation you want to resume by clicking it.
4. Complete the information.
5. Click **Save**.

[Back to the Continuum...Create Registration](#)

Create Registration

TrackOne
@Work Solutions
Jean Eisaman - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management
Client Home Page
Edit Participant
Reminders/Tasks
Application and Enrollment
Work History
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms

Administration
Administrative File Review

Application and Enrollment
The list below displays the client's applications. To record a new application, click the **New Application** button. To edit an existing application, select the **Edit Application** option from the **Action** menu next to the desired record. If the application has been processed and the client is acceptable for enrollment, select the **Enrollment** option from the **Action** menu to add or edit the enrollment.

New Application Cancel

2 records found.

App. Date	Interviewer	Eligibility	Enroll Date	Exit Date
8/21/2006	Jean Eisaman	A	8/18/2006	

[Edit Application](#)
[Create Registration](#)
[Monthly Contact](#)
[Follow Ups](#)

TrackOne
@Work Solutions
Jean Eisaman - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management
Client Home Page
Edit Participant
Reminders/Tasks

8/18/2006

TrackOne Registration
Enter the Planned Start and Exit Dates.

The actual Participation Date (the date of the first program-funded service or activity for this client), and the Last Service Date are calculated by the system. If ninety days have passed since the Last Service Date, the system will automatically exit the participant from the program.

Planned Start Date: * 08/21/2006

Enrollment Categories-Select the WIA funding streams used to serve this participant.

WIA Adult:
 Dislocated Worker:
 WIA Youth:
 Rapid Response:
 National Emergency Grant (NEG):
 Trade Adjustment Act (TAA):

Participation Dates-The first and last service dates are displayed below. If no services/activities occur for 90 days, the participant will be automatically exited as of the Last Service Date.

Participation Date:
 Last Service Date:
 Actual Exit Date:

TAA Tracking-This section for TAA program use ONLY.

TAA Petition Number:
 TAA Participant ID:
 Eligible for ATAA:
 Training Waiver/Reason: No
 Training Waiver Date:
 Date Waiver Revoked:
 Training Program ID:
 Training Contract Review Date:
 Total Cost of Training:
 Total Expenses Paid by TAA:
 Total Travel Expenses Paid:
 Total Subsistence Expenses Paid:
 Total Other Expenses Paid:
 TAA Deregistration Notice:

TAA - Employment at Dislocation

Separation Date:
 Annual Pay:
 # of Months Employed:
 Recalled by Former Employer:

Save Pause Cancel

TrackOne
@Work Solutions
Jean Eisaman - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management
Client Home Page
Edit Participant
Reminders/Tasks
Application and Enrollment
Work History
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms

Administration
Administrative File Review

TAA Tracking-This section for TAA program use ONLY.

TAA Petition Number:
 TAA Participant ID:
 Eligible for ATAA:
 Training Waiver/Reason: No
 Training Waiver Date:
 Date Waiver Revoked:
 Training Program ID:
 Training Contract Review Date:
 Total Cost of Training:
 Total Expenses Paid by TAA:
 Total Travel Expenses Paid:
 Total Subsistence Expenses Paid:
 Total Other Expenses Paid:
 TAA Deregistration Notice:

TAA - Employment at Dislocation

Separation Date:
 Annual Pay:
 # of Months Employed:
 Recalled by Former Employer:

Save Pause Cancel



Important! For TAA folks, Registration/Enrollment is a new procedure. We have to do this in preparation for our new “vision” of case management. Remember that you won’t just provide program-specific services, but rather identify for your client what services from ALL the programs he/she could benefit from.

Procedure

1. Click **Application and Enrollment** on the TrackOne Navigation Panel.
2. Click the  **Gear** icon left of the application.
3. Select **Create Registration** on the action icon list.
4. Select all Enrollment Categories that apply.
5. If TAA is the Program selected, enter the TAA Tracking information into the appropriate boxes located at the bottom of the screen.
6. Click the **Save** button.

Additional Points:

- Look at the enrollment categories section of the screen, eventually this will auto-populate.
- The categories are the report parameters you can use to run reports. What you check here determines where your client will show up in reports.

Next...Case ManagerAssignment

Case Manager Assignment

The screenshot shows a web browser window with the URL <https://www.trackone-in.com>. The page title is "ClientTrack.Net - Microsoft Internet Explorer". The TrackOne logo is in the top left, and "@Work Solutions" is in the top right. The user is logged in as "Jean Eisaman - Indy WIA Training". The navigation menu includes "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking". The "Case Management" section is active, showing "Add New Client" and "Find Client" buttons. The client information for "Johnson, Kate Marie" is displayed: 278-35-3545, 5/15/1986. The "Case Manager Assignment" form is the main focus, with the following fields: "Begin Date:" (08/22/2006), "End Date:" (empty), "Case Manager:" (Jean Eisaman), "Location:" (Selected Option Not in the Current List), "Enrollment:" (-- SELECT --), "Language:" (English), and "Status:" (Active). There are "Save", "Pause", and "Cancel" buttons at the bottom right of the form. The Windows taskbar at the bottom shows the start button, several open applications, and the system clock at 1:30 PM.

Procedure

1. Click on the **Case Manager** link from the **Edit Participant** menu on the navigational panel.
2. Click on the **Add New** button.
3. Select the **Case Manager**.
4. Select the **Location, Enrollment, Language** and **Status** from the drop-down menus.
5. Click the **Save** button.

Next...Goals

Goals

TrackOne

Work Solutions

Jean Eisaman - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management

- Client Home Page
- Edit Participant
- Reminders/Tasks
- Application and Enrollment
- Work History
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Indy WIA Goal Plan-Admin

Goal

Identify the information on the participant's individual goal.

Goals can be set up for all participants. If recording an employment goal, select the Goal Type "Employment Goal". All other goals for WIA participants (Older Youth, Adult, Dislocated Worker) or TAA participants use the "Other, Non-younger youth".

WIA Youth Goals: The *WIA Goal Type* (Basic Skills, Occupational Skills, Work Readiness) must be selected for WIA Younger Youth. Youth goals must be attained within one year; if the youth does not attain the goal within one year of the date it was set, the Status must be set to "NOT Attained." Younger Youth Skill Attainment rate is a performance measure which looks at the skills set and attained for younger youth.

Status: * Open
 Attained
 NOT Attained

Goal Type: * -- SELECT --

Goal: -- SELECT --

Goal Description:

Goal Date: * 08/21/2006

Estimated Completion Date:

Date Attained:

Explanation: *

Save Pause Cancel

Done

start Navigating TrackOne ... Practice Exercises Fin... Inbox - Microsoft Out... https://www.trackon... 3:02 PM



Important! Goals are **required** for WIA Youth. Additionally, it is good case management to set goals for adults. Career planning should be recorded in adult's goals.

Procedure

1. Select **Goals** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Click the applicable goal Status (In this case, Open)
4. Enter the Goal Type by using the drop-down menu.
5. Enter the Goal by using the drop-down menu.
6. Enter the Goal Description detail information.
7. Enter the Goal Date.
8. Enter the Estimated Completion Date.

Note that the Date Attained is entered when the goal is completed and the status is changed to reflect that the goal has been achieved.

9. Enter an Explanation.
10. Click the **Save** button.

Next...Services

Services

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer

TrackOne @Work Solutions

Jean Eisaman - Indy WIA Training Help Topics About DSI Logout

User Home Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client

Johnson, Kate Marie
278-35-3545
5/15/1986

Case Management

- Client Home Page
- Edit Participant
- Reminders/Tasks
- Application and Enrollment
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- Credentials
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- Print ISS
- TAA Forms

Administration

- Administrative File Review

Indy WIA Activities-Admin

Activity

To add an activity, enter the following information.

Begin Date:* 08/18/2006

Service/Activity Title:*

Category:

Line Code:

Service Type:

Provider:

Funding Stream: -- SELECT --

Program Enrollment: -- SELECT --

Training Provider ID:

O*Net Code:

Summary Description:

Status:* Active

Planned End Date:* 08/18/2006

Actual End Date:

Record Created By:

Service Notes-A notes field is provided for any justification, rationale or detail. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

Done

start Inbox - Microsoft Out... 3 Microsoft Word https://www.trackone... FINAL PG and PPT

https://www.trackone-in.com - ClientTrack.NET Search - Microsoft Internet Explorer

Available Services/Activities

Click on the Search button to see a list of all activities, services, and training programs available to the client through the Work One system and other approved service providers. To filter the list, you can select a general Category (Case Management, Training Programs, Support, etc.), and/or a specific Service Type (Line Code). You can also type in a full or partial Provider Name and/or Service Title to match in the listing.

After you have located the desired service in the list, click on it to select it and return to the WIA Activity screen.

Category: -- SELECT --

Service Type: -- SELECT --

Provider Name: -- SELECT --

Service/Program Title:

Search Cancel

Done

start Inbox - Microsoft Out... 3 Microsoft Word https://www.trackone... https://www.trackone... FINAL PG and PPT 4:07 PM

Planned End Date vs. Actual End Date

- For an activity completed the same day it's given, change the status field to complete and all date fields should show the same date.
- For an activity that spans multiple days, the planned end date is just that—the date you have planned for the service to be complete. When the service actually ends, update the service record with the actual end date (may or may not be the same) and change the status to complete.
- Planned End Date is used to determine the soft exit. If it's a future date, the system recognizes that the client has an active service.
- Once the service is completed, the system begins the countdown toward soft exit. If you do not change the planned end date or enter an actual end date; the system will use this as the basis for soft-exit calculations.

Why bother to change the status field to complete? Because it makes it possible for you to run real-time reports!



Reminders about Services

- When the application and registration are taken, staff is required to begin an initial assessment and to start developing a plan and defining next steps. These activities need to be recorded in a case note and an Intensive Service recorded. Use “1-on-1 Counseling and Career Planning” to denote this first intensive service associated with the application.
- Conducting the barriers assessment that is embedded in the eligibility application is an intensive service (although staff must record the service)
- The begin date for services can be back-dated 3 days—this reinforces the need for documentation at point of service.
- Service notes are intended to be a summary description on the ISS—not a substitution for case notes. Service notes are limited to 255 characters.

Next...Adding Case Notes

Adding Case Notes

The screenshot displays the TrackOne web application interface. At the top, the browser address bar shows <https://www.trackone-in.com> - ClientTrack.Net - Microsoft Internet Explorer. The application header includes the TrackOne logo, the user name "Jean Eisaman - Indy WIA Training", and navigation links for "Help Topics", "About DSI", and "Logout".

The main navigation menu includes "User Home", "Case Management", "Employer Management", "Provider Management", "Housing Management", "Grant Management", and "Issues Tracking". Under "Case Management", there are links for "Add New Client" and "Find Client".

The left sidebar contains a "Case Management" section with the following items: Client Home Page, Edit Participant, Reminders/Tasks, Application and Enrollment, Work History, Services, Goals, Case Notes, Credentials, Test Results, Print ISS, and TAA Forms. Below this is an "Administration" section with "Administrative File Review".

The main content area is titled "Edit Case Note". It contains the following fields:

- Entry Date:** 08/21/2006
- Entered By:** Jean Eisaman
- Regarding:** (empty text box)

Below the form fields, there is a checkbox labeled "Domestic Violence Case Note" with a note: "Domestic Violence Case Note-If checked, Case Note will be set to Organization Restricted". A callout box labeled "Domestic Violence Case Note Information" points to this checkbox. Below the checkbox is a "Select a Template" dropdown menu.

The "Case Note" text area contains the text "Client Name: Kate Johnson". Above the text area is a rich text editor toolbar with options for Bold (B), Italic (I), Underline (U), Font color, Size, and other formatting tools.

The Windows taskbar at the bottom shows the Start button, several open applications (Navigating TrackOne..., Practice Exercises Fin..., Inbox - Microsoft Out..., https://www.trackon...), and the system clock showing 3:05 PM.

Procedure

1. Select **Case Notes** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.

Note the information on the Data Entry Screen. If this is a Domestic Violence Related Case Note, click the box and this note will only be viewed by your organization.

3. Enter Regarding information.
4. Enter the Case Note.
5. Click **Save**. Note that saved case notes cannot be modified.



Notes

- This is where all the details of your work is to be recorded. All case notes, except for Domestic Violence case notes print on the ISS.
- DO NOT complete a separate case note for each service provided during the same visit. Create one case note for the VISIT and document all services in that visit.

Next...Adding Credentials

Adding Credentials

The screenshot shows a web browser window with the URL <https://www.trackone-in.com>. The page title is "ClientTrack.Net - Microsoft Internet Explorer". The TrackOne logo is in the top left, and "@Work Solutions" is in the top right. The user is identified as "Jean Eisaman - Indy WIA Training".

The navigation menu includes: User Home, Case Management, Employer Management, Provider Management, Housing Management, Grant Management, and Issues Tracking. The "Case Management" menu is expanded, showing options like "Add New Client" and "Find Client".

The main content area is titled "WIA Credentials Summary-Admin" and "Credentials". It displays the client information for "Johnson, Kate Marie" (ID: 278-35-3545, DOB: 5/15/1986). The "Credentials" section contains the following form fields:

- Credential Type:** A dropdown menu currently set to "- SELECT -".
- Description:** A text input field.
- Planned Attain Date:** A date input field with a calendar icon.
- Actual Attain Date:** A date input field with a calendar icon.
- Comments:** A large text area for notes.

At the bottom of the form are three buttons: "Save", "Pause", and "Cancel". The Windows taskbar at the bottom shows the Start button, several open applications, and the system clock at 3:38 PM.

Procedure

1. Click **Credentials** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Select the Credential Type by using the drop-down menu.
4. Enter the Description.
5. Enter the Planned Attain Date. Actual Attain Date will be entered upon completion of the Credential.
6. Enter any Comments.
7. Click the **Save** button.



Notes

- It is important to note anything beyond a high school diploma as a credential at the time of application.
- If the client achieves another credential, you come back and add that on these screens.
- This is where you record performance outcomes.
- This is information that is also helpful as you work with the client to create a resume.

Next...Assessment/Test Results

Assessment/Test Results

TrackOne @Work Solutions

Jean Eisaman - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home | **Case Management** | Employer Management | Provider Management | Housing Management | Grant Management | Issues Tracking

[Add New Client](#) [Find Client](#)

Indy WIA Test Results-Admin

Test and Test Results

Identify the test the client took along with the results of that test.

WIA Youth Literacy and Numeracy Gains Measures:
Test names marked with (Y) can be used to assess literacy and numeracy skills for the WIA Youth performance measures. Test names marked with (Y-ESL) can be used to assess English literacy skills for English as a Second Language (ESL) youth for the WIA performance measures.

For the performance measures, youth must be given a pre-assessment within 60 days of enrolling in WIA, and a post-assessment within one year, and once a year thereafter while they are participating in WIA.

Test Name: *

Test Type: *

Date: *

Score:

Grade Level:

Passing/Competent:

Description/Comments:

Case Management

- Client Home Page
- Edit Participant
- Reminders/Tasks
- Application and Enrollment
- Work History
- Services
- Goals
- Case Notes
- Credentials
- Test Results**
- Print ISS
- TAA Forms

Administration

- Administrative File Review

Done Internet

start | Navigating TrackOne ... | Practice Exercises Fin... | Inbox - Microsoft Out... | https://www.trackon... | 3:41 PM

Procedure

1. Click **Test Results** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter the Test Name by using the drop-down menu.
4. Enter the Test Type by using the drop-down menu.
5. Enter the Date (mmddyyyy).
6. Enter the test Score.
7. Enter the Grade Level achieved based on the test score.
8. Click the Passing/Competent box based on the test results.
9. Enter the Description/Comments.
10. Click the **Save** button.



Notes

- You must have these for youth after 7/1/06
- You must have raw scores. You also may include grade equivalent.
- This is needed for common measures literacy and numeracy goals.
- You must use the test types listed – they are the ones approved by the DOL and DWD.

Next...ISS

ISS (Individual Service Strategy / Individual Employment Plan)

https://www.trackone-in.com - ClientTrack Reports - Microsoft Internet Explorer

1 / 2 Main Report 100% BusinessObjects View Log

I.S.S. for Johnson, Kate Marie

INDIVIDUAL SERVICE STRATEGY / INDIVIDUAL EMPLOYMENT PLAN

Name: Johnson, Kate Marie Social Security Number: 278-35-3545

Address: 4312 Echo Lane D.O.B.: 05/15/1986

Fort Wayne, IN 46825 School Status: Out of school; H.S. Graduate

Phone: 260-451-5536 First Service Date: 08/18/2006

Cell:

Email Address: Kate@internet.com

INITIAL ASSESSMENT

Employment Status At Start	Educational Status At Enrollment
<u>Employment Status:</u>	<u>Years of School Completed:</u>
Not Employed	HS Graduate

Credentials

Employment History

<u>Position:</u> Buser, Dish Washer	<u>Employer:</u> Uno's Chicago Bar & Grill
<u>Start Date:</u> 8/2/04	<u>End Date:</u> 8/11/06
<u>Status:</u> PT	
<u>Hours Per Week:</u> 30.00	<u>Hourly Rate:</u> 8.50
<u>Job Duties, Specialized Skills, and Equipment Used:</u> Bus tables, set tables, stock dishes, wash dishes	

COMPREHENSIVE & SPECIALIZED ASSESSMENT

start Navigating TrackOne ... Practice Exercises Fin... Inbox - Microsoft Out... https://www.trackon... https://www.trackon... 3:45 PM

Procedure

There is only one step in generating an ISS:

- Click **ISS** on the TrackOne Navigation Panel.

Why?

The ISS is not a form! It is a “roll up” of information across the system. This represents standardized case planning. Just as TrackOne has an integrated application across programs, it has an integrated ISS.

Note: The ISS is not in final format. It will change when WP and vets are brought on to system. DWD is o.k. with everyone using it in current format.

If you have enhancement suggestions, contact your Master User or the Helpdesk to have them logged.

Next...Training Enrollment

Training Enrollment

http://209.43.125.157 - ClientTrack.Net - Microsoft Internet Explorer

Data Systems INTERNATIONAL ClientTrack.net

Test User 1 - Indy WIA Help Topics About DSI Logout

User Home Client Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New 6/8/2006 WIA

Enrollment Accounts

Enrollment Accounts

View Date: 06/15/2006 Refresh

Source	Max. Amount	Begin Date*	End Date*	Acct Total*	Available	Obligations
<input checked="" type="checkbox"/> WIA-Adult ITA - PY06-07 - Region 1 - 2006	\$3,000.00	06/15/2006	07/01/2006	\$1,500.00		Obligations
<input checked="" type="checkbox"/> WIA-Adult Support - PY06-07 - Region 1 - 2006	\$500.00	06/15/2006	07/01/2006	175.00		Obligations
<input type="checkbox"/> WIA-DislWrkr Support - PY06-07 - Region 1 - 2006	\$500.00					Obligations
<input type="checkbox"/> WIA-DislWrkr ITA - PY06-07 - Region 1 - 2006	\$3,000.00					Obligations
<input type="checkbox"/> WIA-Youth Support - PY06-07 - Region 1 - 2006	\$500.00					Obligations
<input type="checkbox"/> WIA-Older Youth ITA - PY06-07 - Region 1 - 2006	\$3,000.00					Obligations
Grand Total:				1500.00		

Admin

http://209.43.125.157 - ClientTrack.Net - Microsoft Internet Explorer

Data Systems INTERNATIONAL ClientTrack.net

Test User 1 - Indy WIA Help Topics About DSI Logout

User Home Client Case Management Employer Management Provider Management Housing Management Grant Management Issues Tracking

Add New Client Find Client 6/8/2006 WIA Computers at Work: An Introduction WIA Service Obligations

WIA Obligation

WIA Obligation

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4/1/1975

WIA Case Management

- Client Home Page
- Edit Client
- Reminders/Tasks
- Application and Enrollment
- Work History
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- ISS Report

Administration

- Review Applications
- Review Exits
- Review Obligations
- Administrative File Review
- Setup Federal Guidelines

Provider:*

Date:*

Account Type:*

Available:

Amount:*

Status:*

Description:*

PO Number:

Save Pause Cancel

Procedure

There are three major steps to this procedure: 1.Create Account 2. Add a Service 3. Create Obligation

Create Account

1. Click the **Client Case Management** tab.
2. Click **Application and Enrollment** on the Program Navigation Panel.
3. Click the  **Gear** left of the application.
4. Select **Enrollment** on the action icon list. The Enrollment screen appears.
5. Click the  **Gear** left of the enrollment.
6. Select **Accounts** on the action icon list. The Accounts screen (shown above - top) will appear.
7. Click the check box left of the applicable account(s) for this client.
8. Enter the Acct Total up to the maximum amount for the account.
9. Click the **Finished** button

Add a Service

Follow the steps we've reviewed before to add the service.  **Important!** Be sure to select program enrollment to get obligation to work.

Create Obligation

1. Select the  **Gear** icon left of the activity just entered for the client.
2. Select **Obligation** on the action icon list.
3. Select the **Add New** button on the Data Entry Screen. The next screen (shown above – bottom) will appear.
4. Search for available Providers by clicking the  Magnifying Glass and then selecting the provider from the list.
5. Enter the **Date** and **Account Type**. The Available amount will auto-fill.
6. Enter **Amount** for this activity. Status will auto-fill (at this point it will show “pending”).
7. Enter **Description** and **PO Number**.
8. Click **Save**.

Next...Exit Information Screen

Exit Information Screen

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TrackOne @Work Solutions

Crystal Johnson - Indy WIA Training [Help Topics](#) [About DSI](#) [Logout](#)

User Home **Case Management**

[Add New Client](#) [Find Client](#)

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000-00-5024
9/19/1981

5/24/2006

Case Closure Information

To exit a client from the Application and Enrollment, please complete the following information.
To review and/or update the client's work history, click the **Update Work History** button; please make sure this information is up-to-date when the client is exited.

Participation Date: 5/24/2006
Last Service Date: 9/27/2006
Planned Exit Date:
Date Completed All Goals:
Exit Code: -- SELECT --
Actual Exit Date:

Exit - Educational-If the reason for exit was educational, please complete the following information

School Status at Exit: -- SELECT --
Was a Degree Attained: -- SELECT --
Post Secondary Education:
Advanced Training:
Enrolled in Educ. Program During Participation:
Military Service:
Apprenticeship:

Exit - Employment-If the exit is due to employment, please complete the following information.

Exit Work History: -- SELECT --

Reviewer Information-Please complete the following information to identify the Interviewer and reviewer

*Interviewer:** Crystal Johnson
*Interview Date:** 09/28/2006
Reviewer:
Date File was Archived:

Done Internet

Notes:

- Planned exit = anticipated soft exit date = accurate real-time reporting
- Understand how soft exits are calculated and applied -- remember the retro-active nature of the calculation
- Understand how the final service impacts the soft exit (and the importance of documentation of that final service).

Next...Follow-up

Follow-up

- Follow-up services are those that do not “restart the clock” if you use them.
- These contacts and services do not count toward participation or performance calculations.

A list of these services are available inside TrackOne, under Important Documents.

Special Needs for TAA

Be sure you know where to find your extra documentation on the webpage. Write it down here:

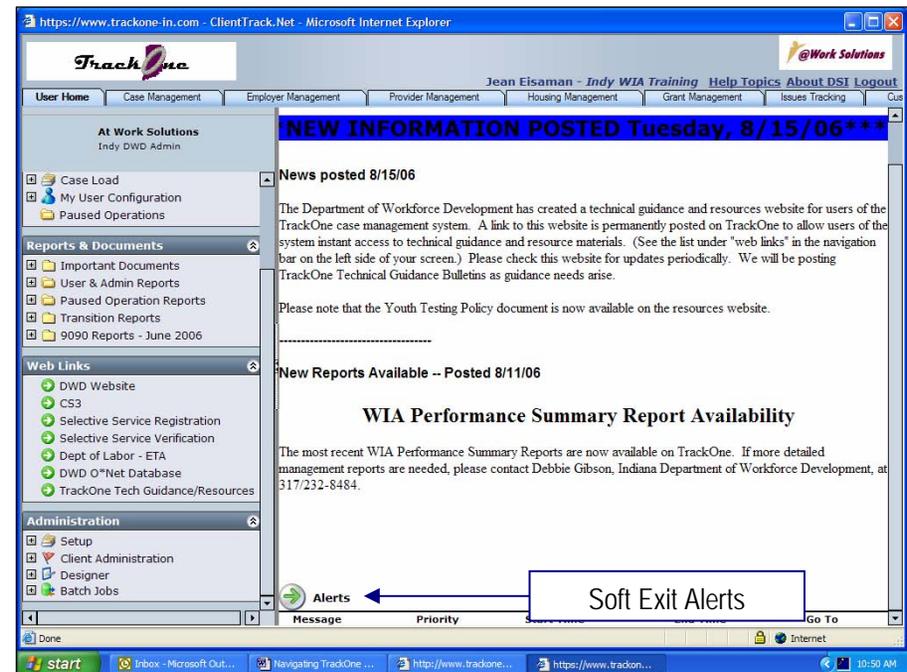
Managing Alerts

There will be a 60 day alert notifying the case manager of the pending soft exit that will occur after 90 days. There will be a 90 day alert announcing the exit of a client.

There are three places in the system that alerts appear:

- **User Home** – User Home Page
- **User Home** – Tasks and Alerts
- **Case Management** – (Case File) Tasks and Alerts

Alerts will not disappear, even if a service is added during that time period, unless you acknowledge the alert. You can do this by going to “Task” then to “Find Alert” and then choose Delete.



What do I need to print and keep for data validation, DWD, DOL?

List them here:

Reports Available to Case Managers

Report Development Schedule		
Priority	Report/Roster Name	Estimated Completion Date
1	Reporting table extract (WIASRD like file -- will be used for DOL Reports, will also be available to regions)	Oct. 2, 2006
2	Last Service Date Roster	Sept. 11
2	Last Service Date Caseload Roster	Sept. 11
2	Planned Exit Roster	Sept. 13
2	Planned Exit Caseload Roster	Sept. 13
3	Planned Exits With Employment Roster	Sept. 15
3	Planned Exits With Employment by Caseload	Sept. 15
3	Contact Information - Planned Exit Roster by Region/Site (EXCEL)	Sept. 15
3	Contact Information - Planned Exit Roster by Case Manager (EXCEL)	Sept. 15
3	Contact Information - Official Exit Roster by Region/Site (EXCEL)	Sept. 15
3	Contact Information - Official Exit Roster by Case Manager (EXCEL)	Sept. 15
4	First Intensive Service by Region/Site	Sept. 22
4	First Intensive Service by Caseload	Sept. 22
4	Core Service(Only) by Region/Site	Sept. 22
4	Core Service(Only) Last Service Date by Region/Site	Sept. 22
4	Core Service(Only) Exits by Region/Site	Sept. 22
5	WIA ADULT-DW File Review Sheet	Sept. 27
5	WIA Youth File Review Sheet	Sept. 27
6	Monthly Milestones Report	Sept. 29
7	Individual Training Account Summary Sheet	Oct. 6
7	Obligations Summary by Funding Source	Oct. 6
7	Obligations Detail by Client/Accounts	Oct. 6
8	WIA Youth Pre-Tests	Oct. 13
8	WIA Youth Missing Pre-Test	Oct. 13
8	WIA Youth Goals	Oct. 13
8	WIA Youth Without a Single Goal	Oct. 13
9	Real-time Dashboard Indicators	Oct. 27
9	Year-to-Date Training Summary by Targeted Industry/Occupational Group	Oct. 27