Table of Contents

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

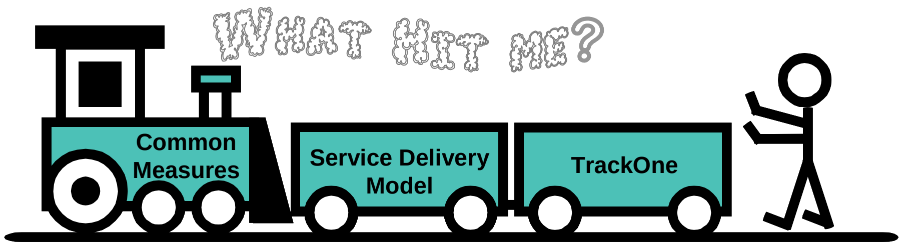
What We Will Accomplish Today

- 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?

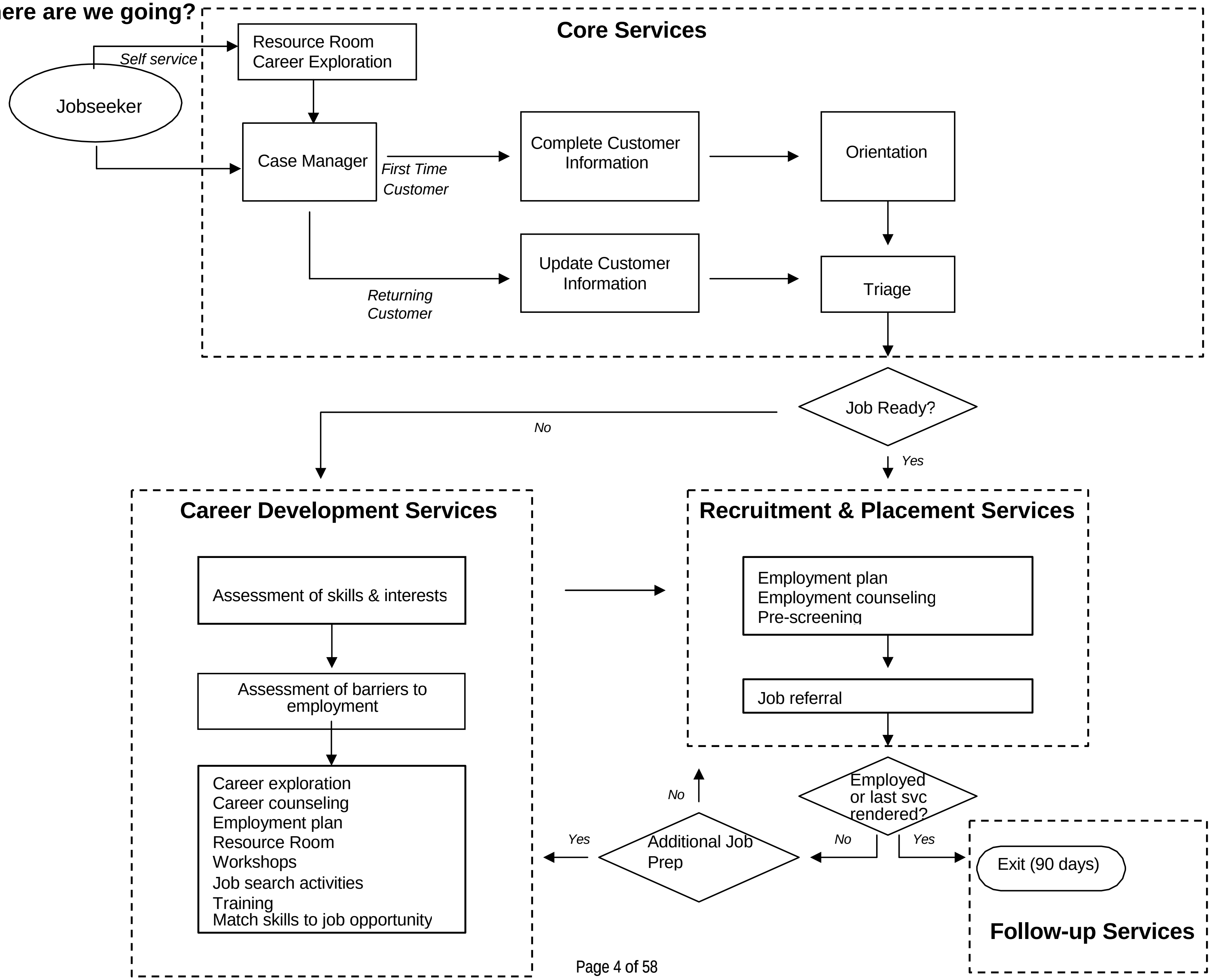
The SDM is a performance-driven, functional framework that classifies service delivery functions with respect to how they support performance objectives. An SDM can be siloed, as it is now, or integrated. The goal is to choose the model that is most efficient and best aligned with the performance objectives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

Characteristics of the new model include the following:

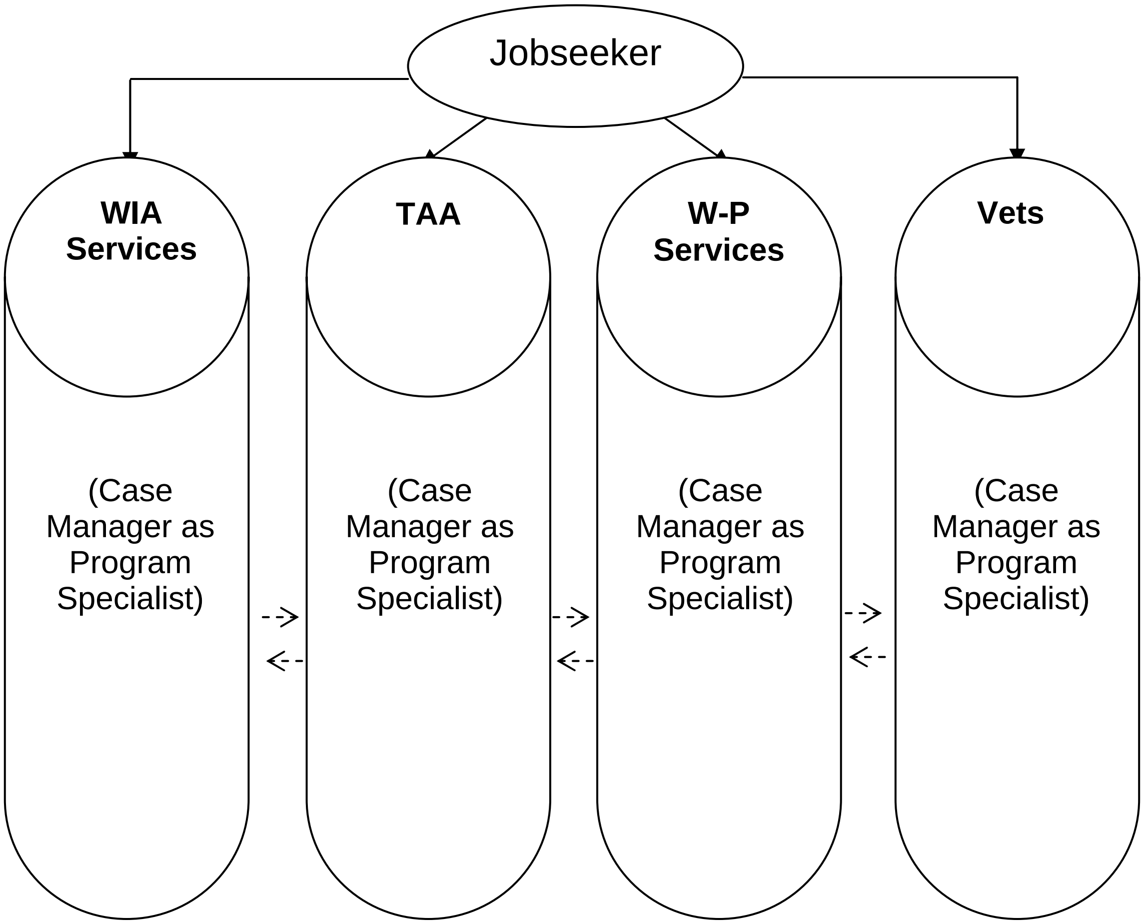
- High-quality services and customer satisfaction are paramount.
- Multiple programs have a single tool for customer service and reporting.
- A move towards aligning our policies to support service integration.
- Caseworkers understand the pathways which exist to move customers from one service to another.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

Figure 1: What it feels like

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.

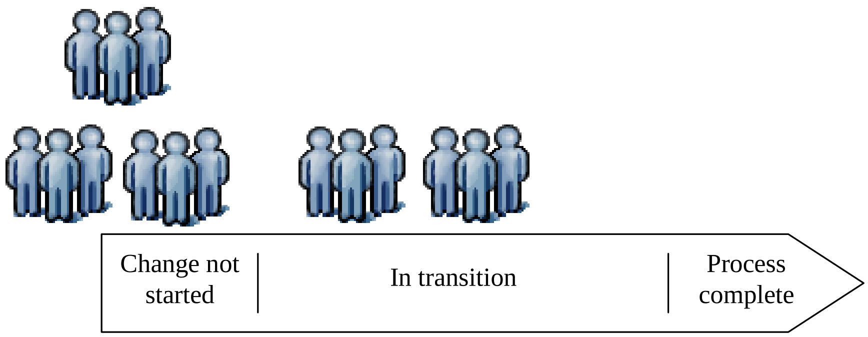


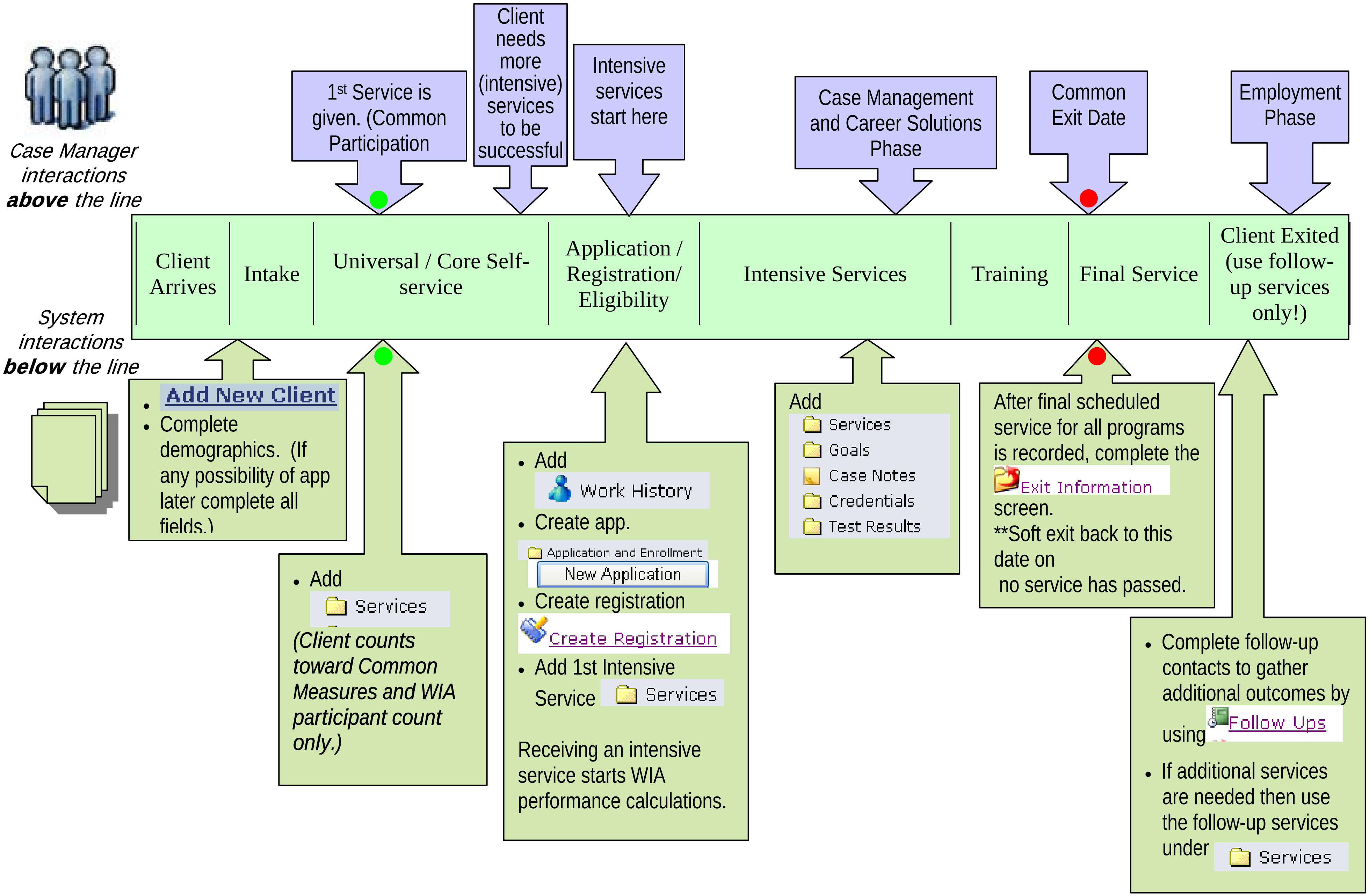
Figure 2: What it is

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

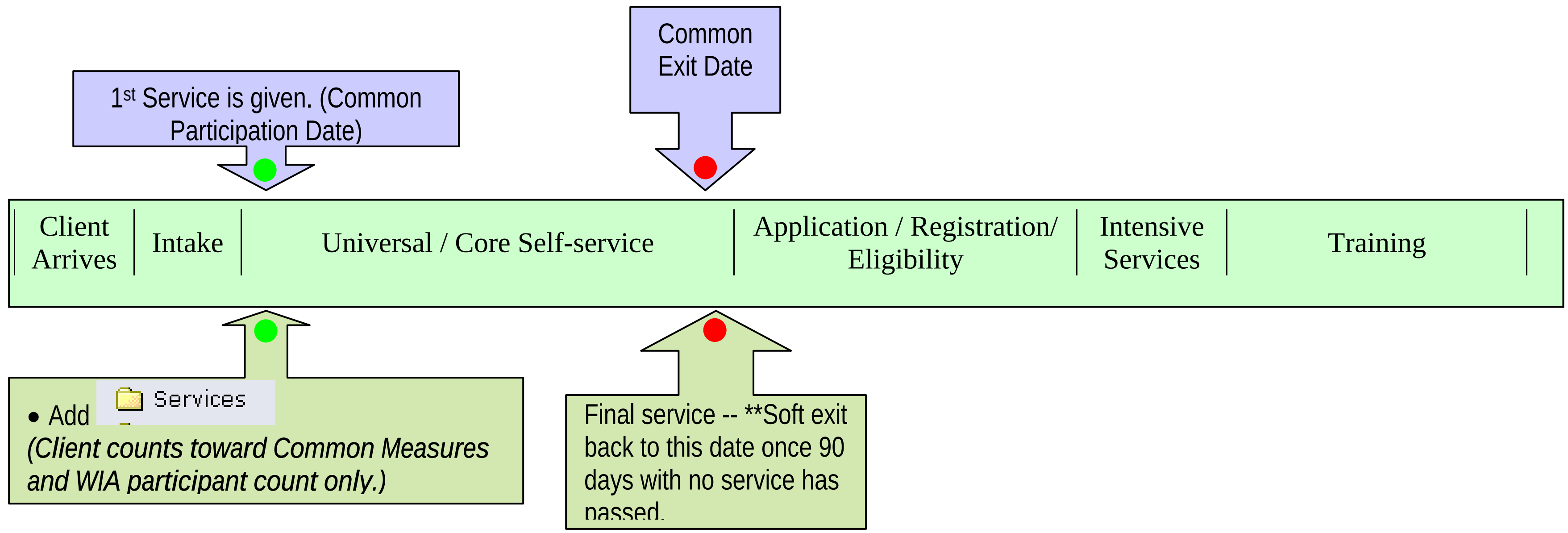
You have an adult client who informs you they've just quit their job. They want to work on their resume and look at whatever job openings you have listed in your office. Referring to the Client Service continuum, enter their information into Track One.

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

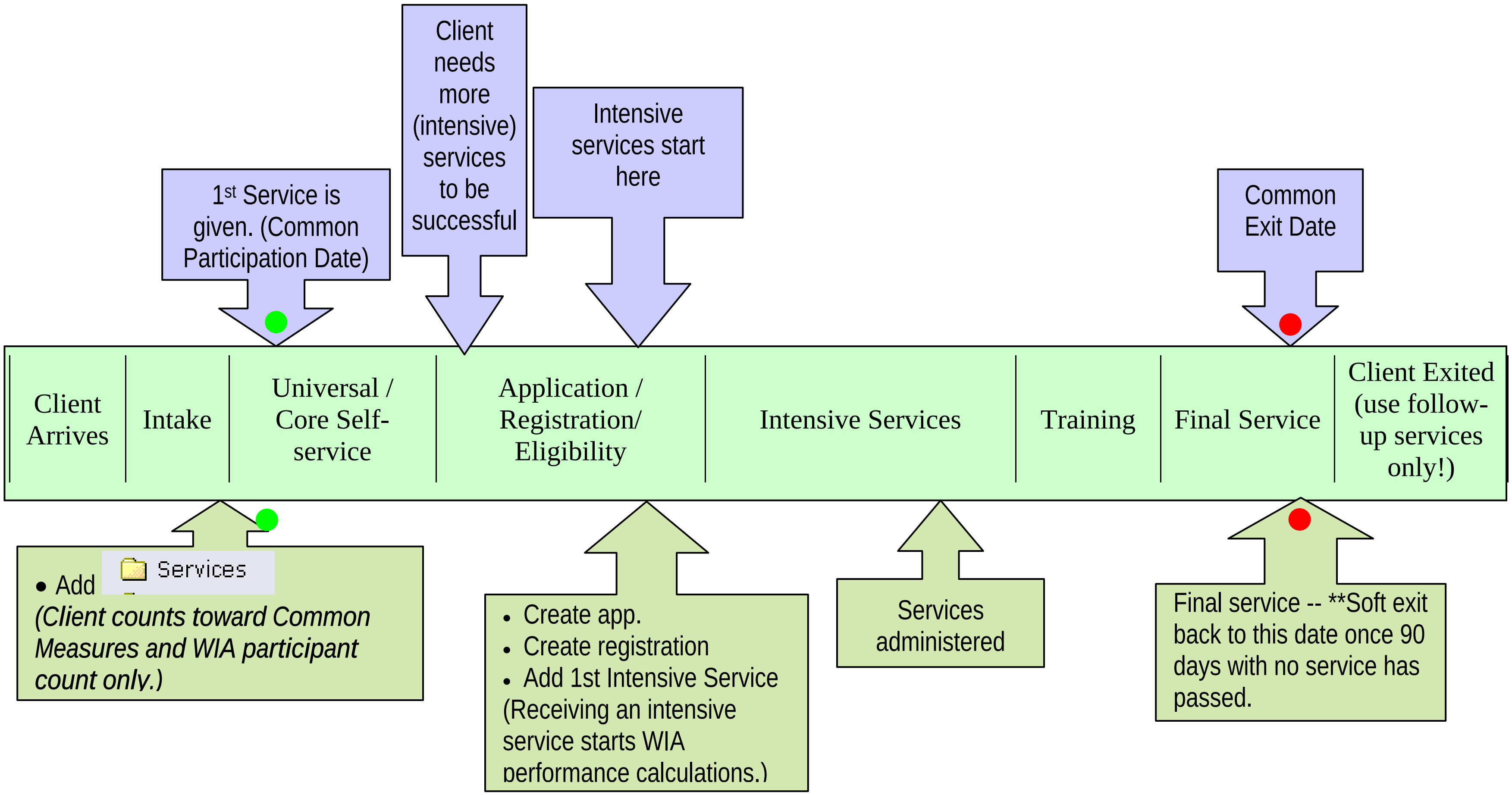
This client would appear in the Common Measures Performance Calculations and the WIA Participant count.



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.

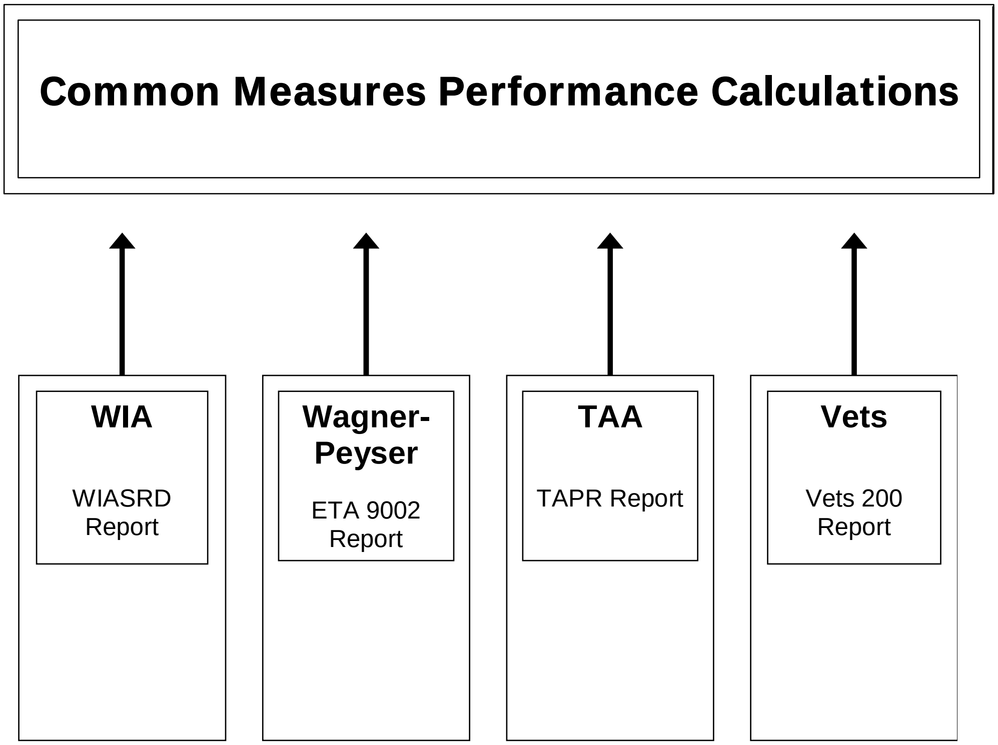
Client Services Continuum – Example #2

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.

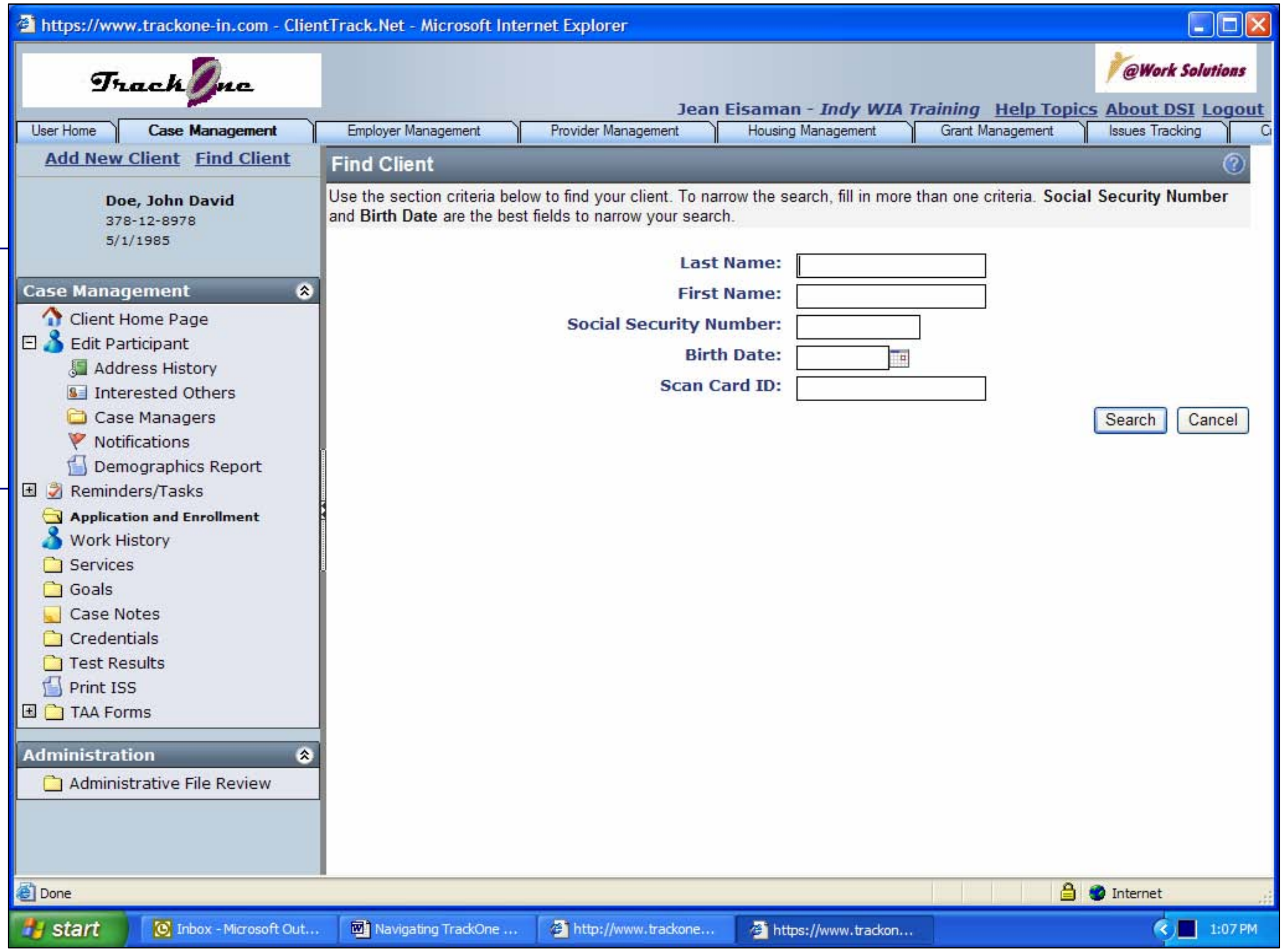
If…	And…	Then…
The client only needs a core service…	The client is not found in the system…	Add basic demographics, then add services.
	The client has a folder in the system…	Add services. This makes them a participant, but they do not count for performance calculations.
The client needs intensive services…	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.



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**.

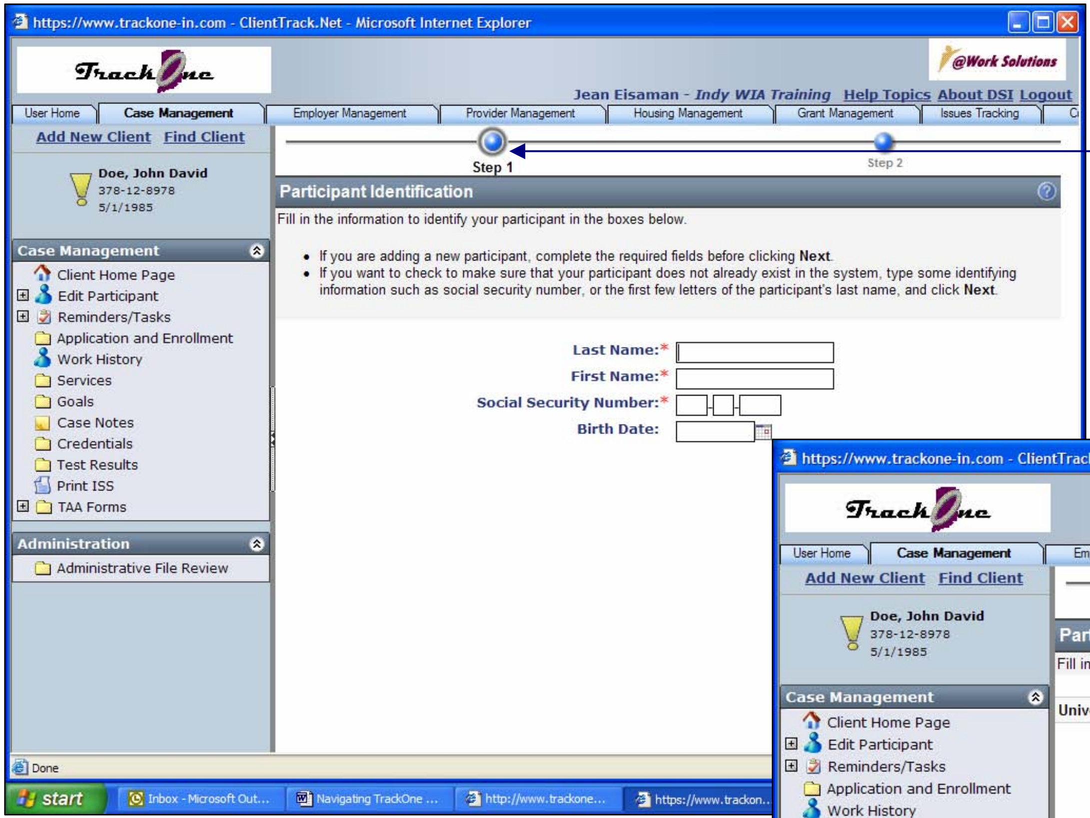
   Important! Searching by last name has led Case Managers to select the wrong client file. Searching by Social Security Number is the best way, but if you must search by last name, be sure you check the Social Security Number to ensure it matches.
3. Click the **Search** button. If you do not enter any 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.

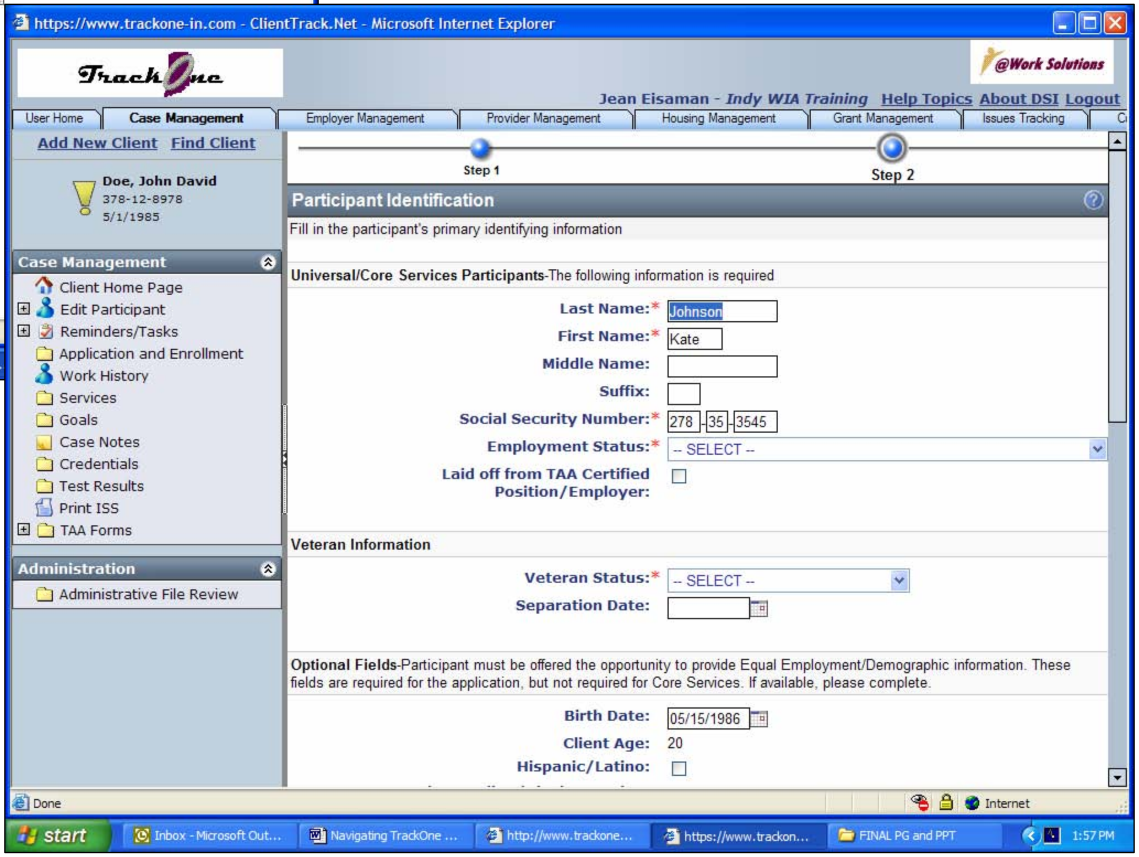
If there is no match by SSN (no client folder already created), you will need to add the client.

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.

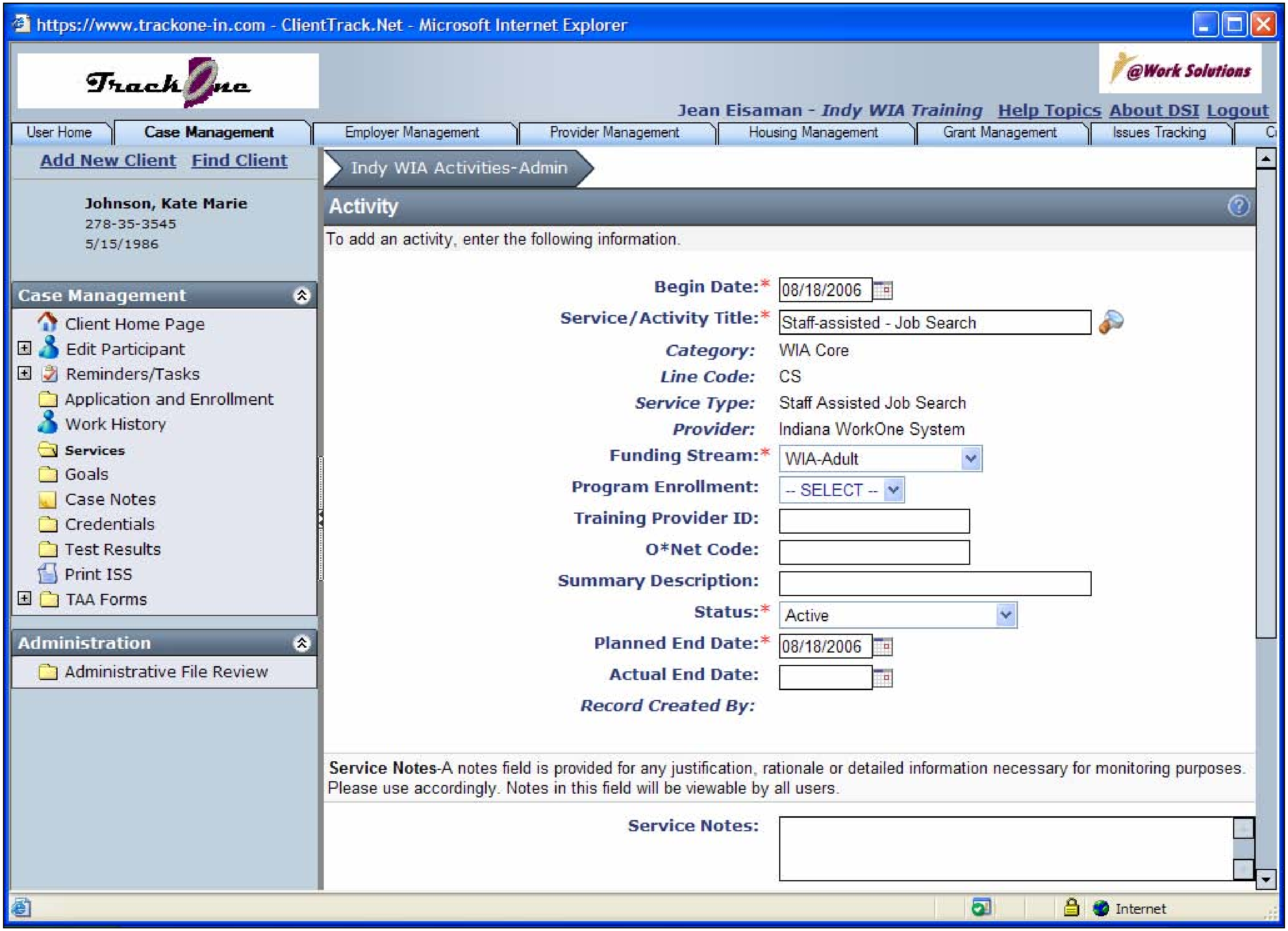
Procedure

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



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.

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

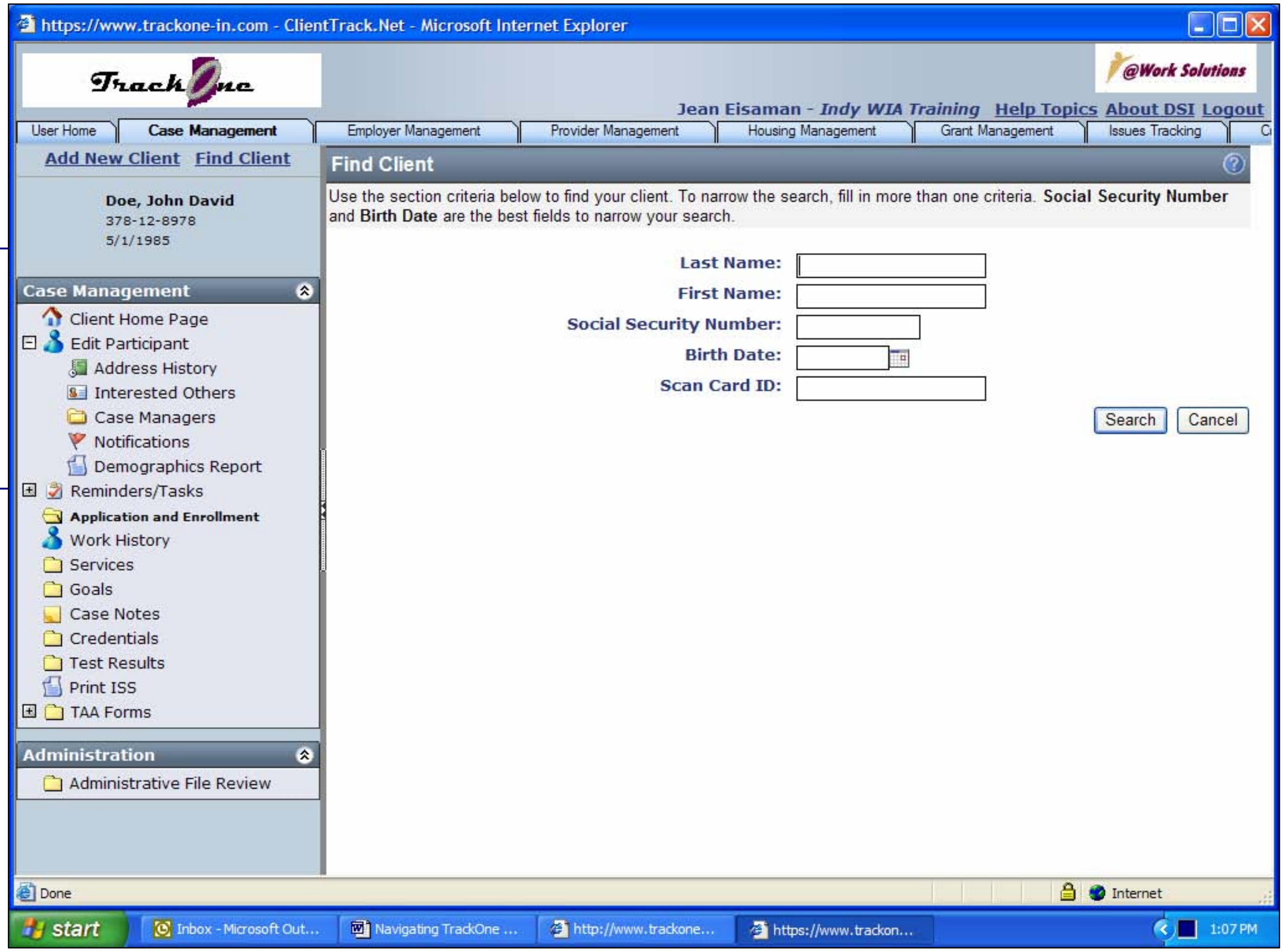
Scenario 2

(This page intentionally left blank)

Find Client

Click the **Find Client** link.

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



Begin…Finding/Adding a client is the first step for any client

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.

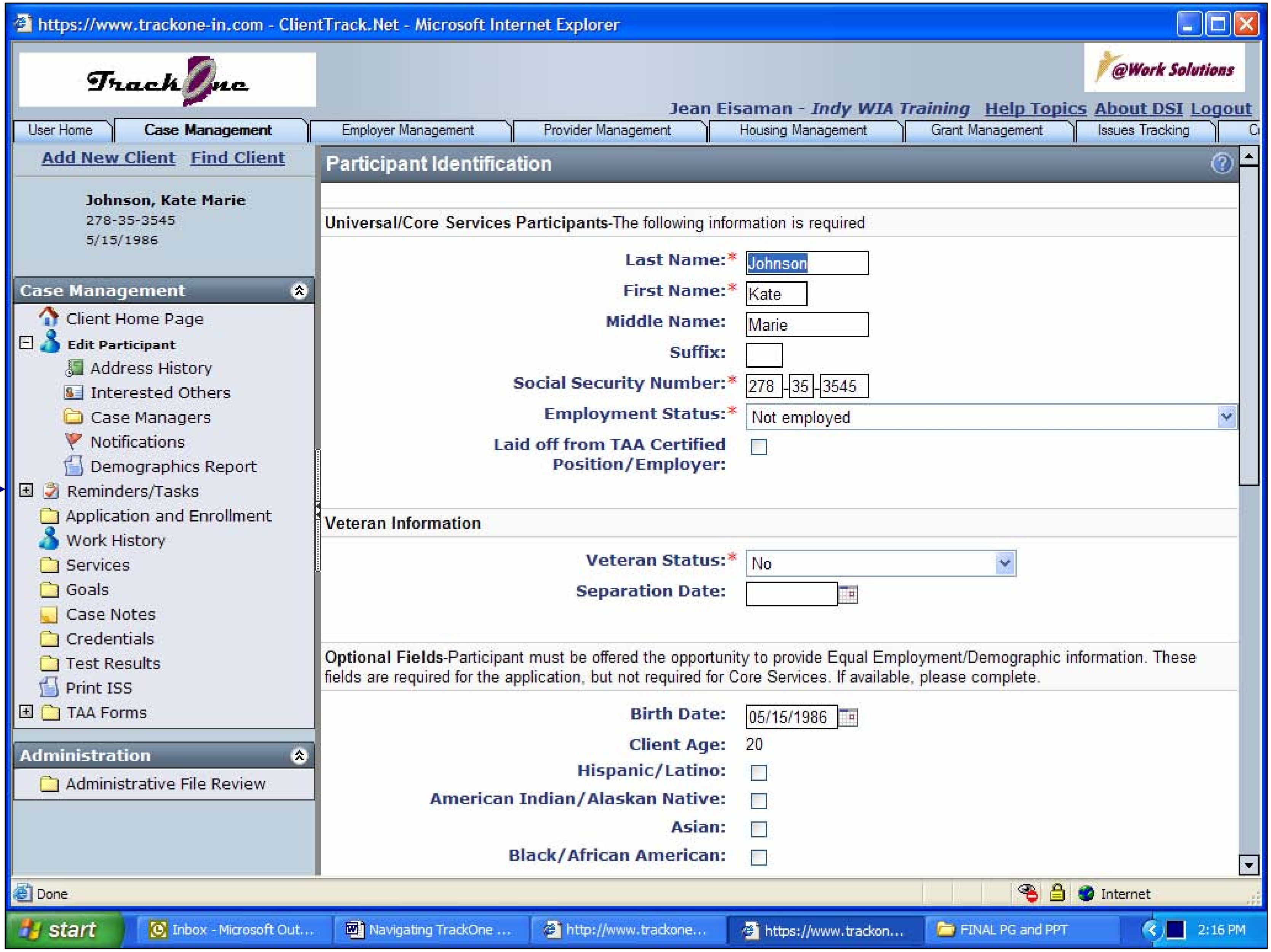
3. Click the **Search** button. If you do not enter any information and click on **Search**, you will get a list of all clients.

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

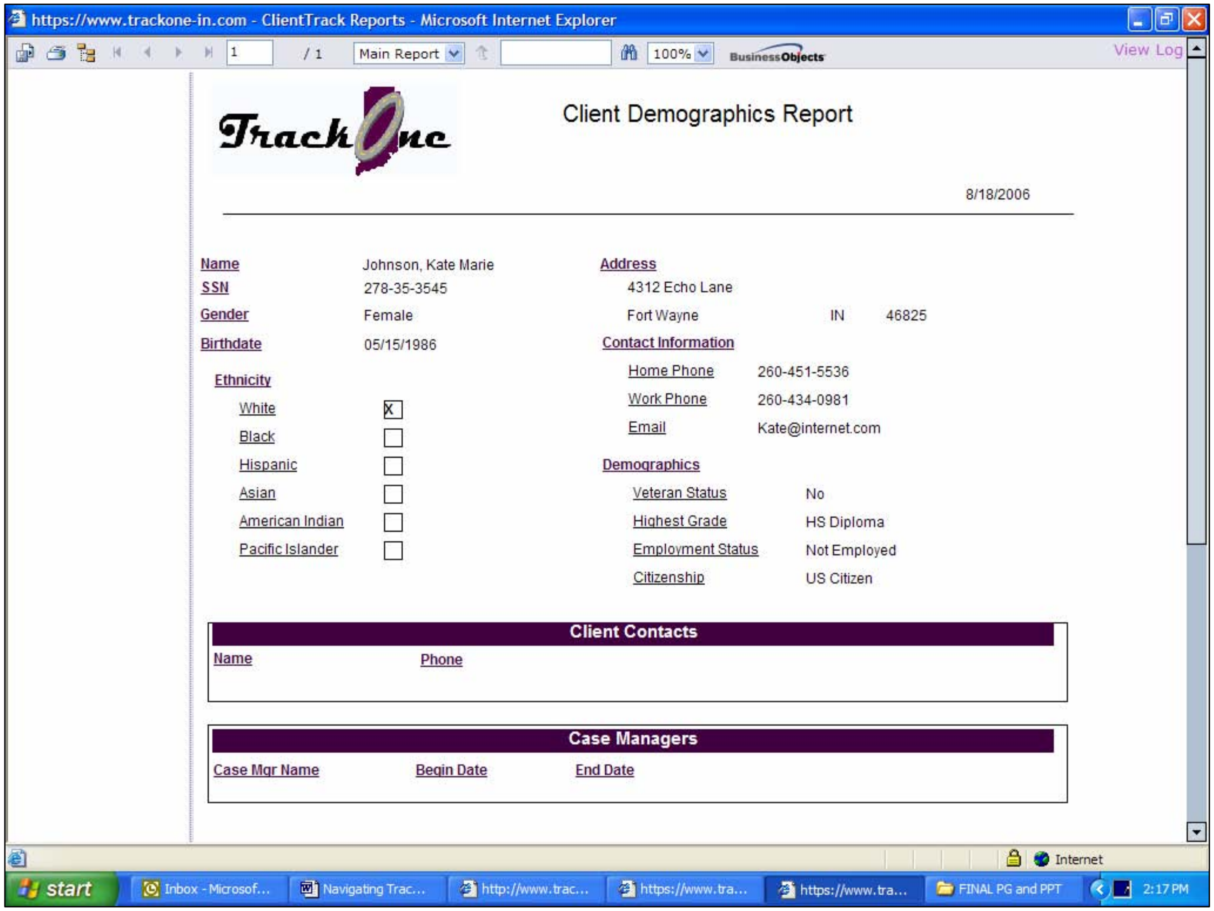
Edit Participant



The **+ (plus)** sign expands the menu item.

Procedure

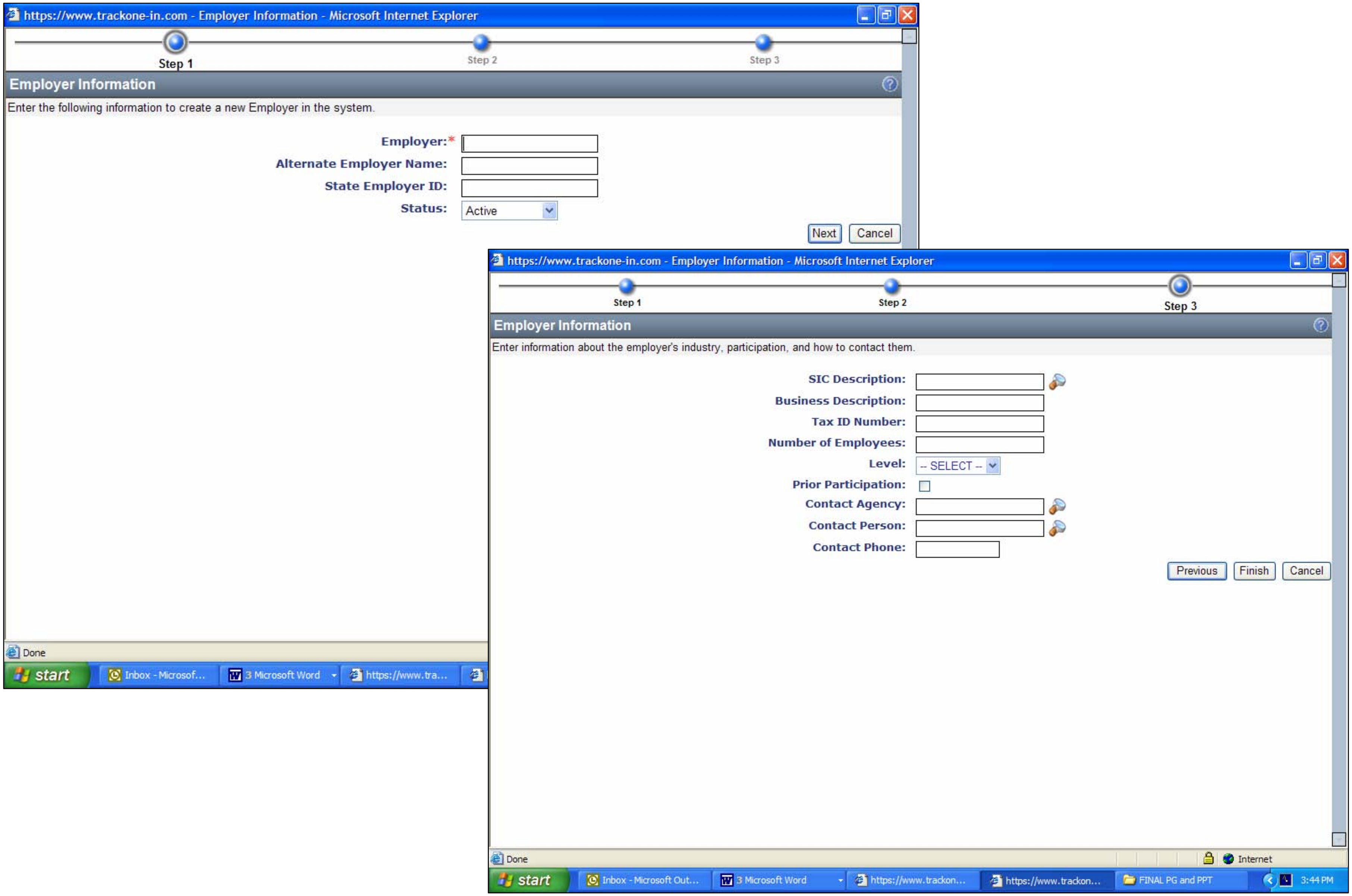
1. Click the **+ (plus)** next to **Edit Client** or click **Edit Participant** on the TrackOne Navigation Panel to expand the menu options.
2. If you need to update or correct the client's information, click **Edit Client** on the TrackOne Navigation Panel.
3. You may then add any information not gathered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



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



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.

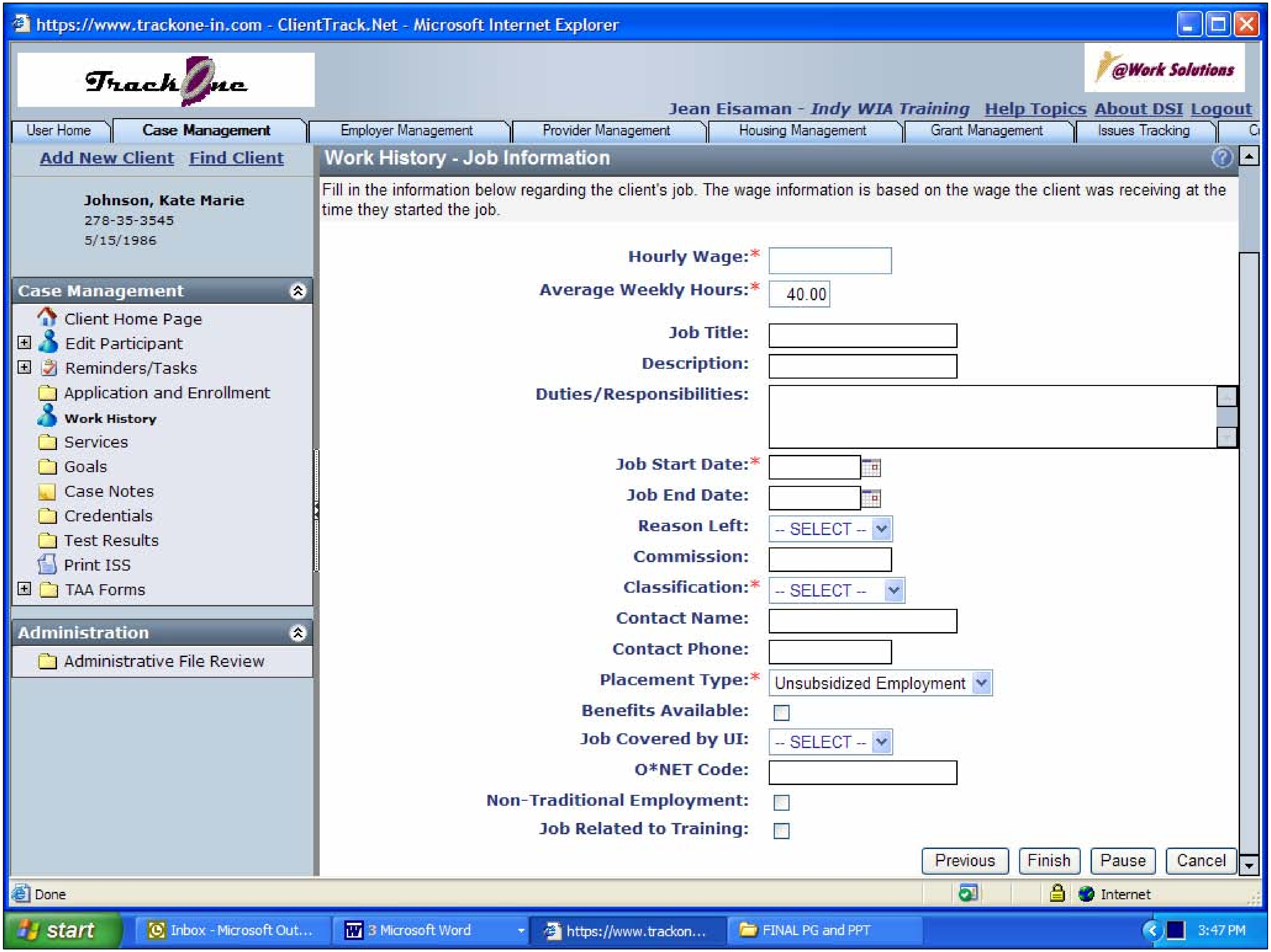
Search for Employer

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

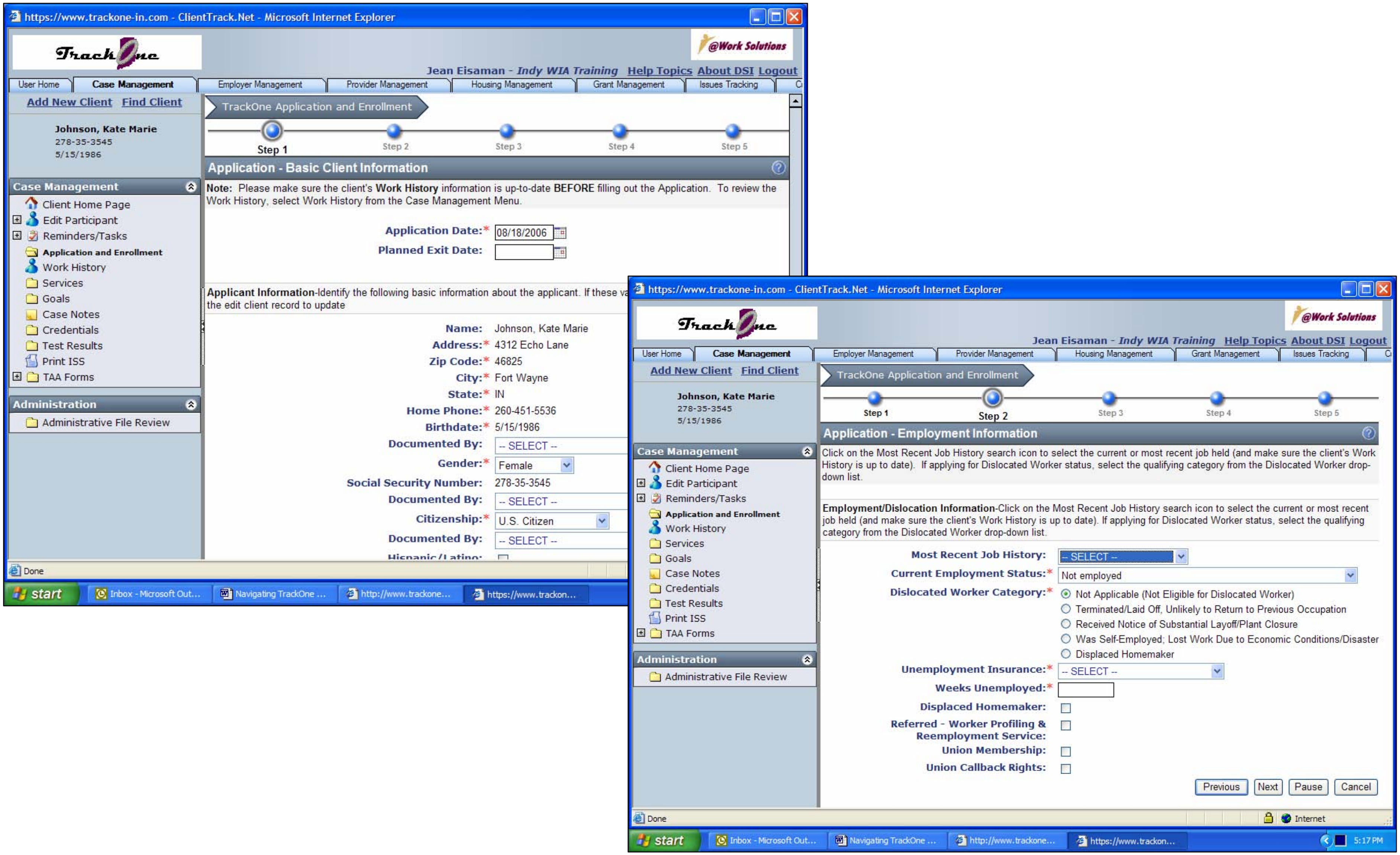


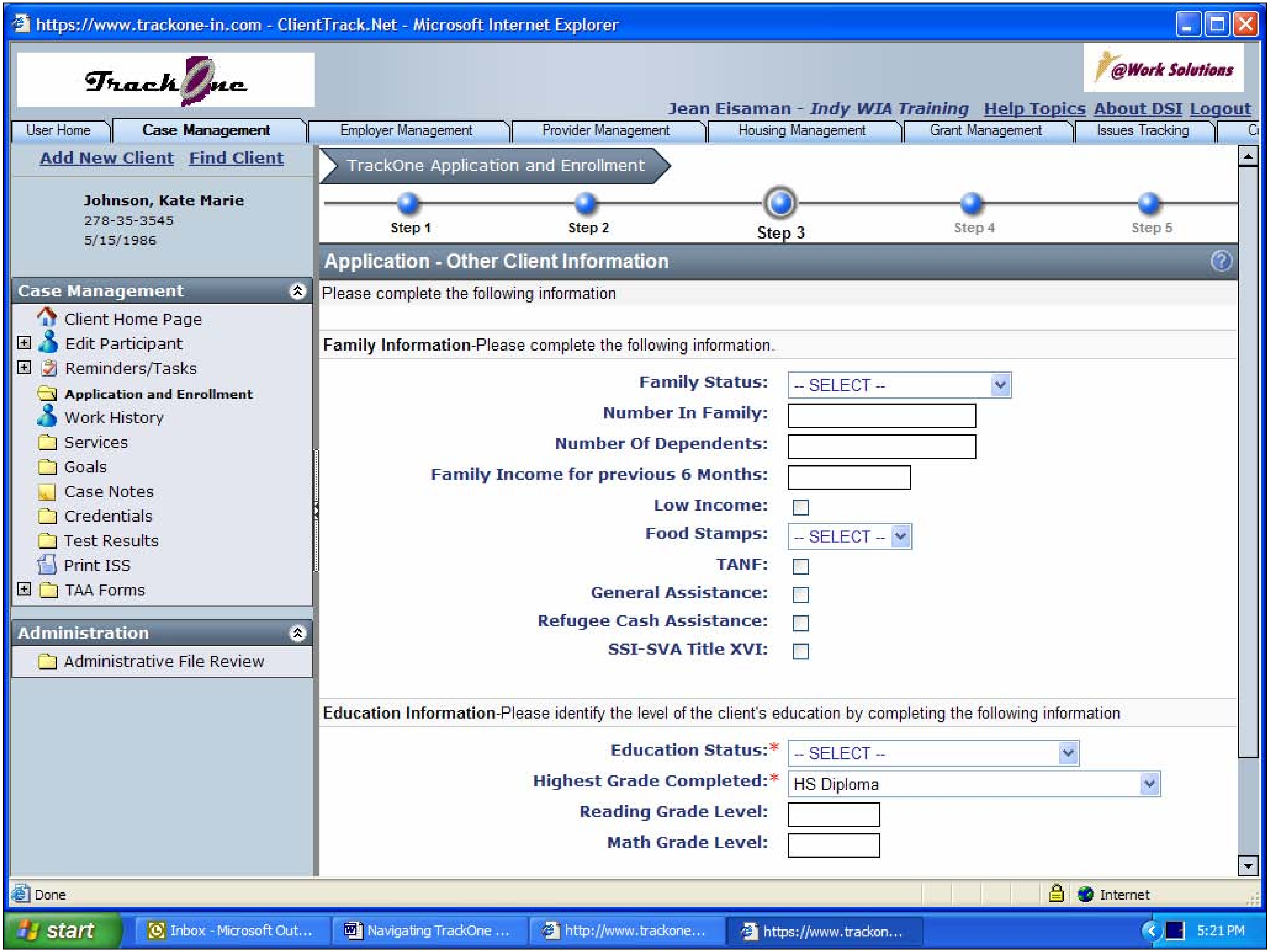
Procedure

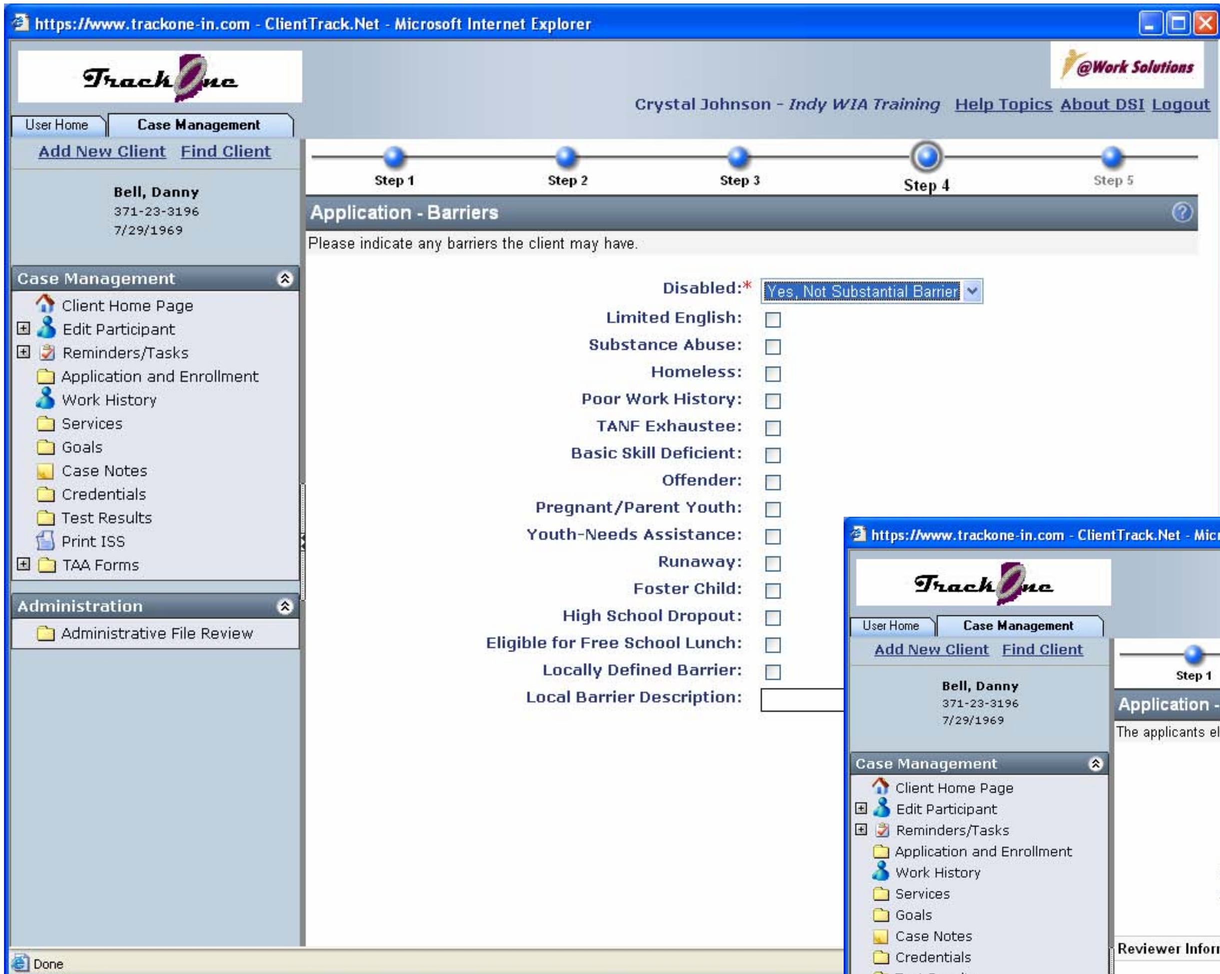
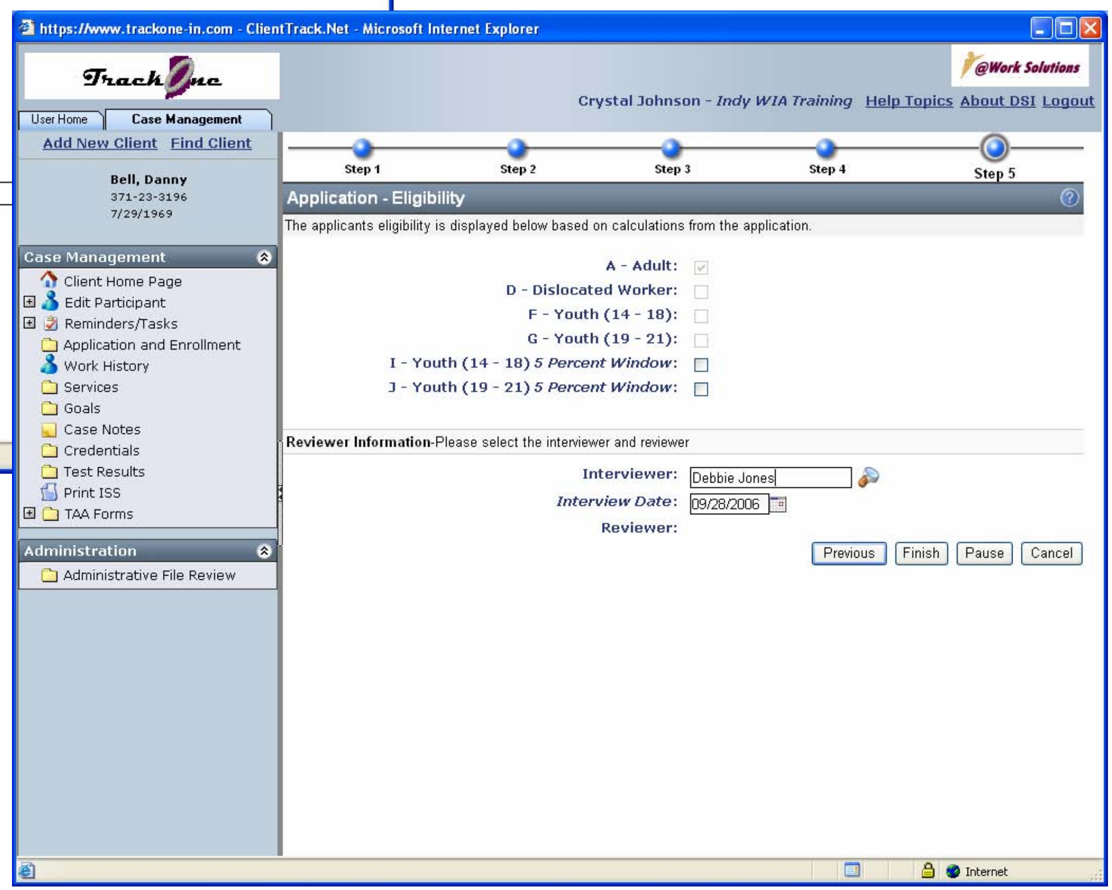
1. Enter the following required fields:
   - Hourly Wage the client is currently receiving or was making at the time they left this job.
   - Average Weekly Hours
   - Job Start Date.
   - Classification
   - Placement Type
2. Complete other, non-required fields, if the information is available.
3. Click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

Next…New Application

New Application




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
Work History
Services
Goals
Case Notes
Credentials
Test Results
Print ISS
TAA Forms
Administration
Administrative File Review
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
@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
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
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:
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

https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer
@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
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:
Debbie Jones
Interview Date:
09/28/2006
Reviewer:
Previous
Finish
Pause
Cancel
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
Internet

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.

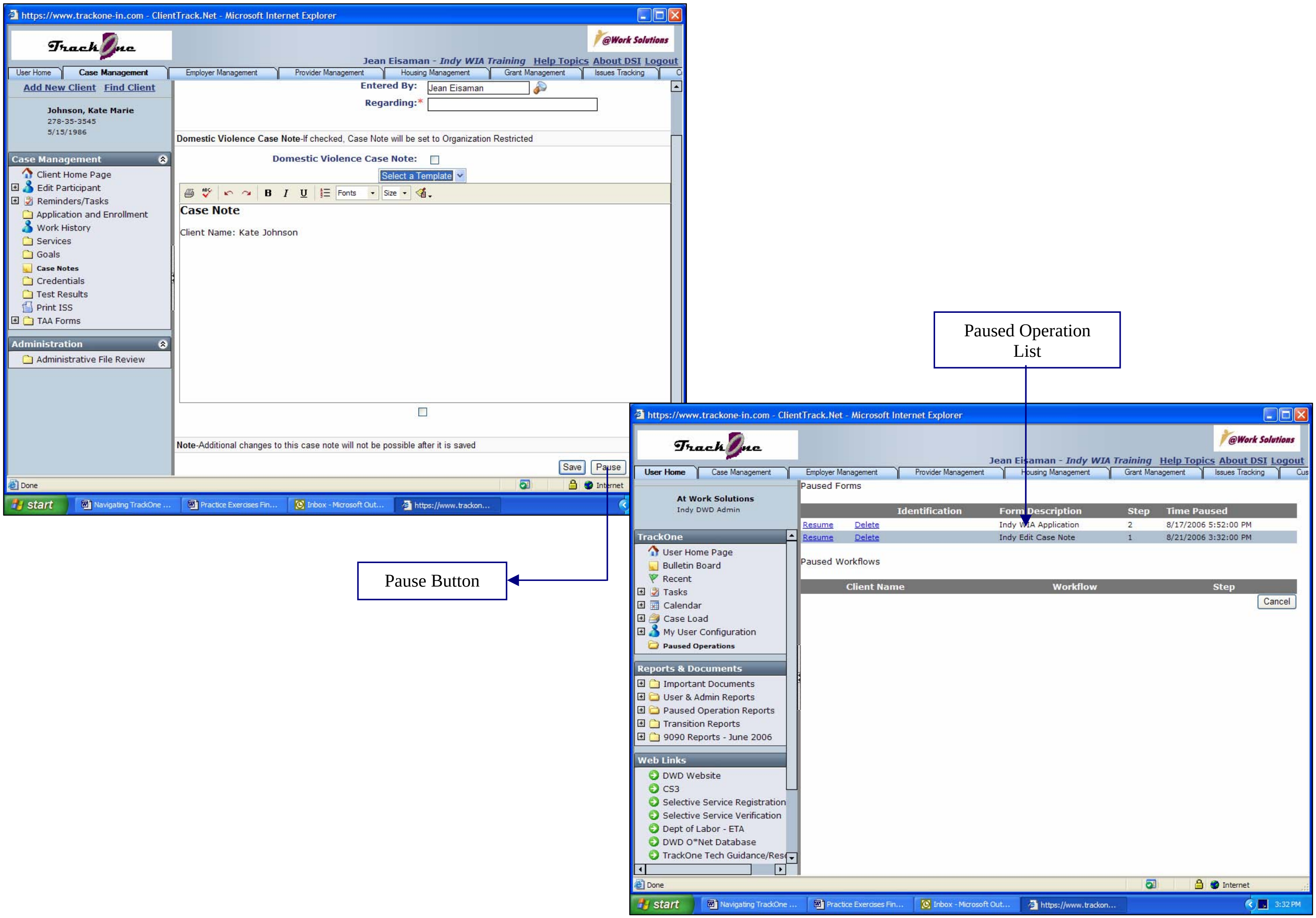
Remember, there should only be **one** active application in the system for the client (because it is a common measures application and spans the programs available). If you find an active application for the client, go straight to adding services.

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



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

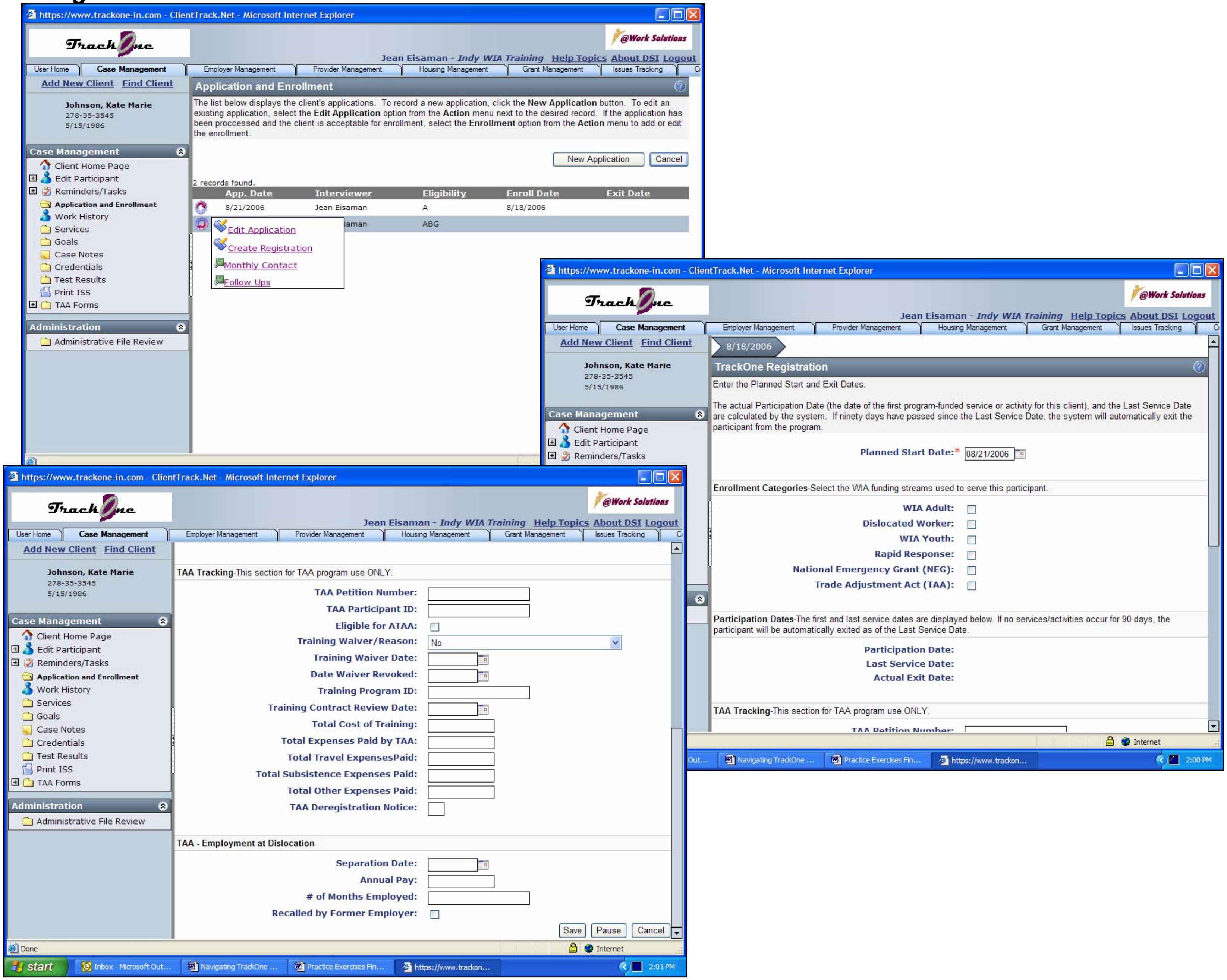
Click the Pause button.

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



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

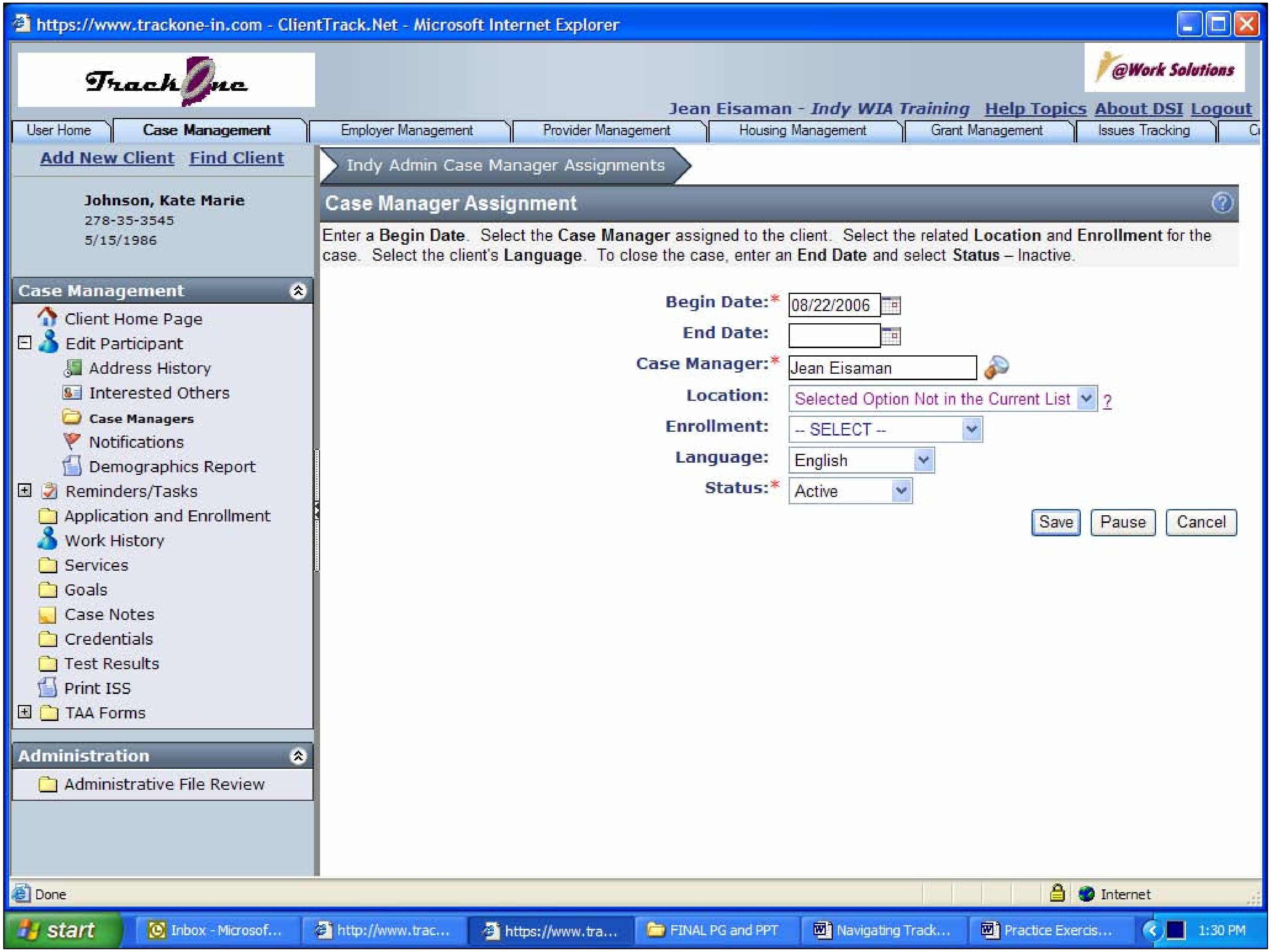
1. Click **Application and Enrollment** on the TrackOne Navigation Panel.
2. Click the **Gear** icon left of the application.
3. Select **Create Registration** on the action icon list.
4. Select all Enrollment Categories that apply.
5. If TAA is the Program selected, enter the TAA Tracking information 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

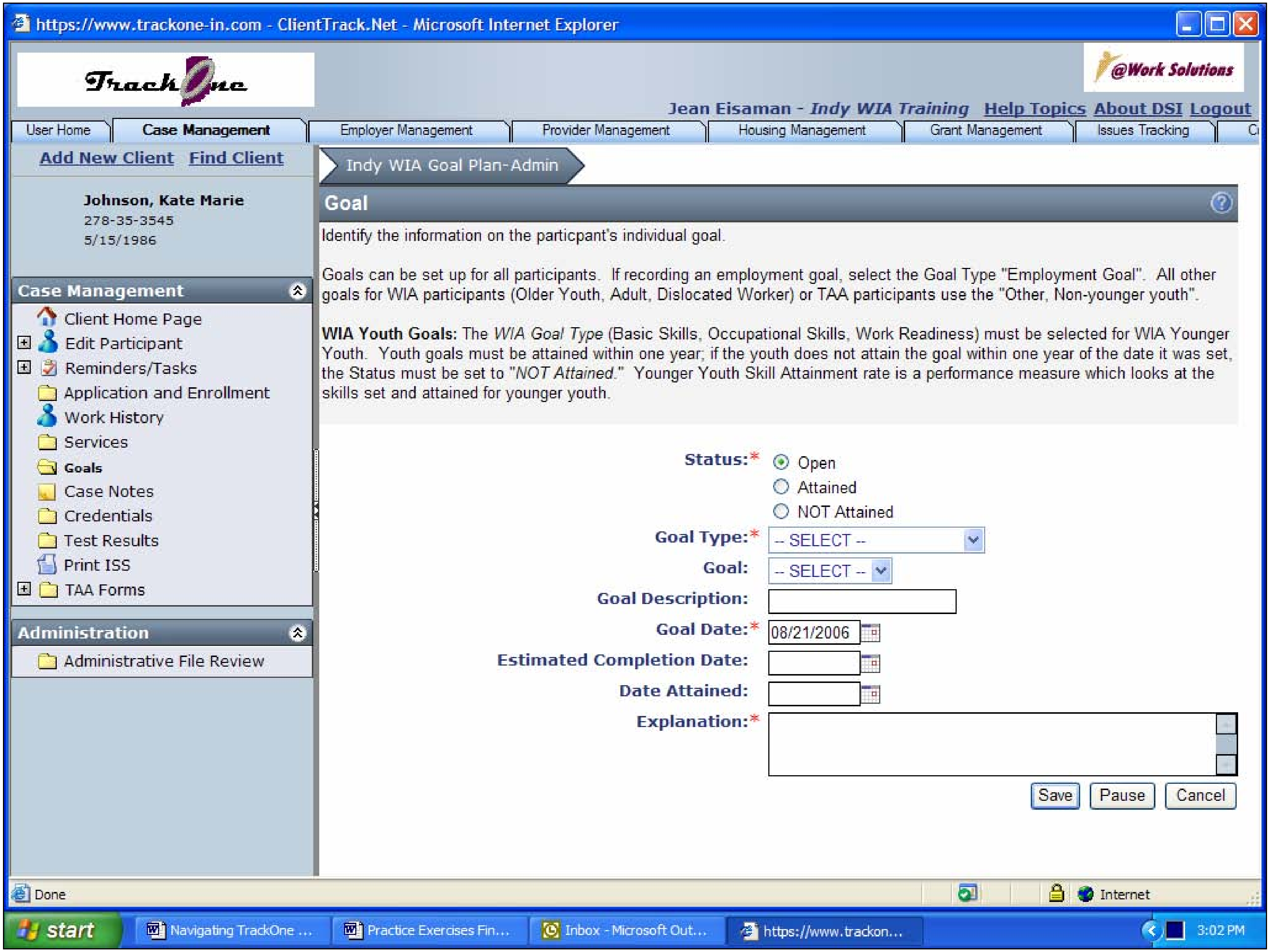


Procedure

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


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
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 particpant'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
Internet
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.

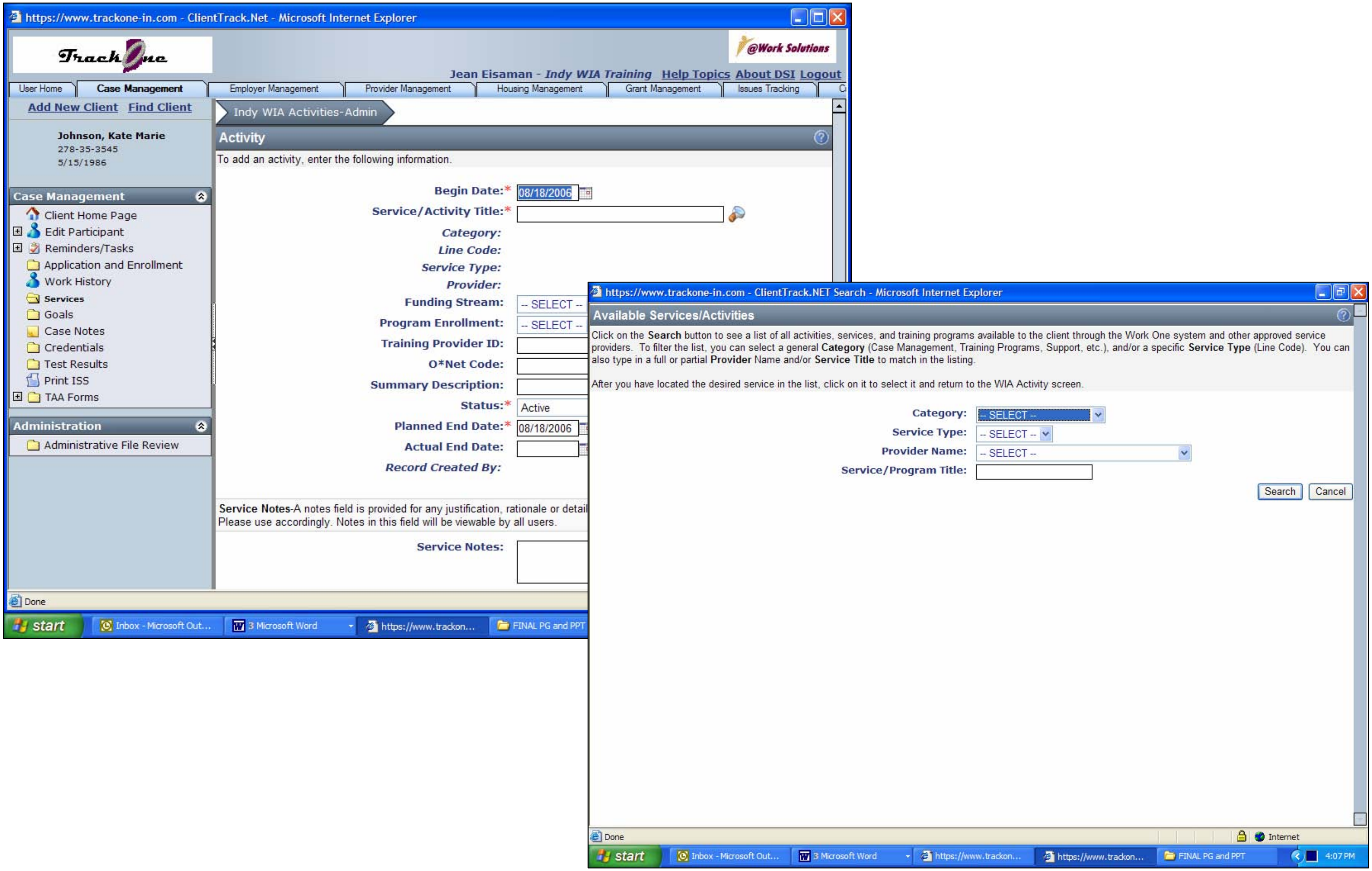
Note that the Date Attained is entered when the goal is completed and the status is changed to reflect that the goal has been achieved.

---

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

Next…Services

Services



https://www.trackone-in.com - ClientTrack.Net - Microsoft Internet Explorer
@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
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:
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
start
Inbox - Microsoft Out...
3 Microsoft Word
https://www.trackon...
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
Internet
start
Inbox - Microsoft Out...
3 Microsoft Word
https://www.trackon...
https://www.trackon...
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.

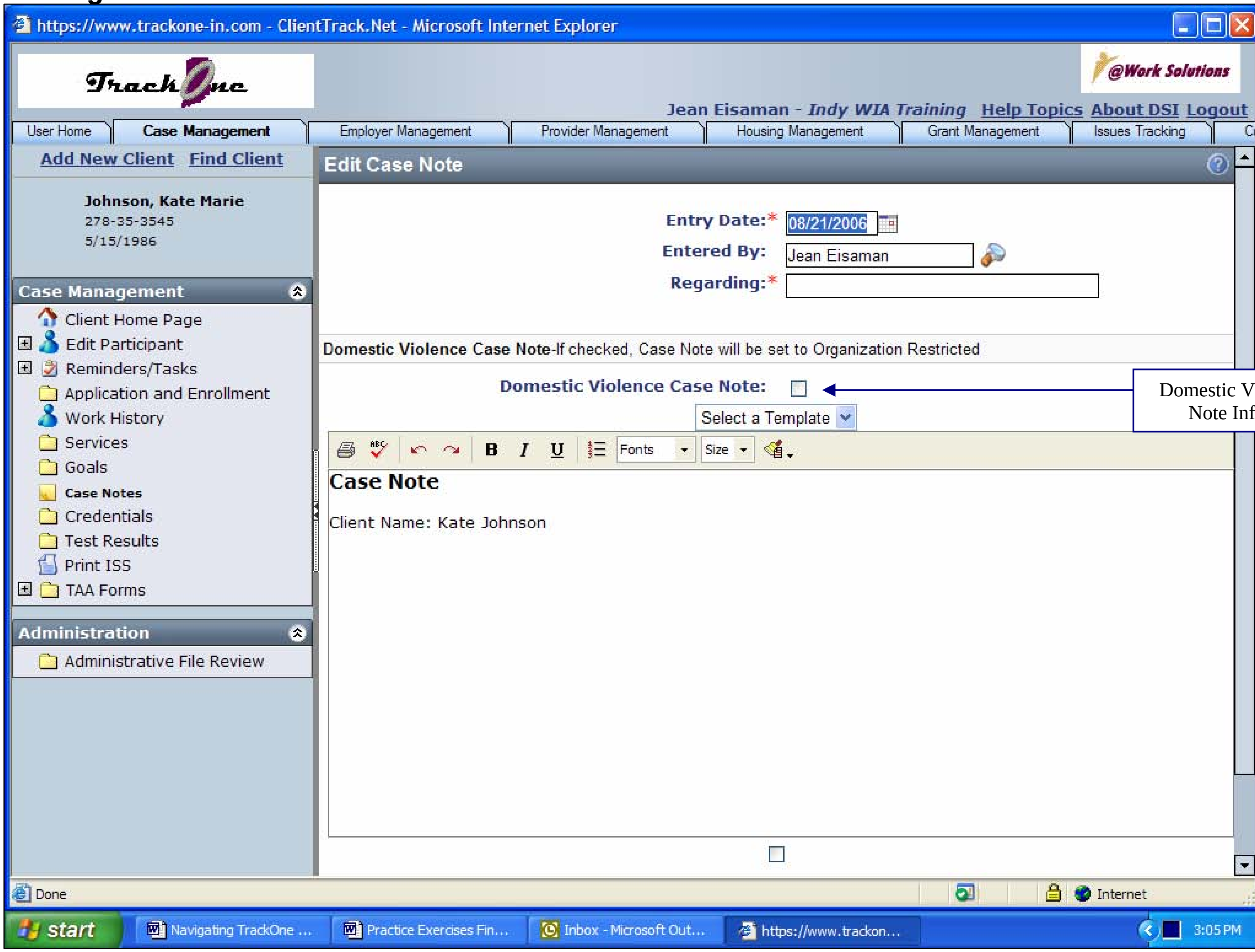
Why bother to change the status field to complete? Because it makes it possible for you to run real-time reports!

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



Domestic Violence Case Note Information

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.

---

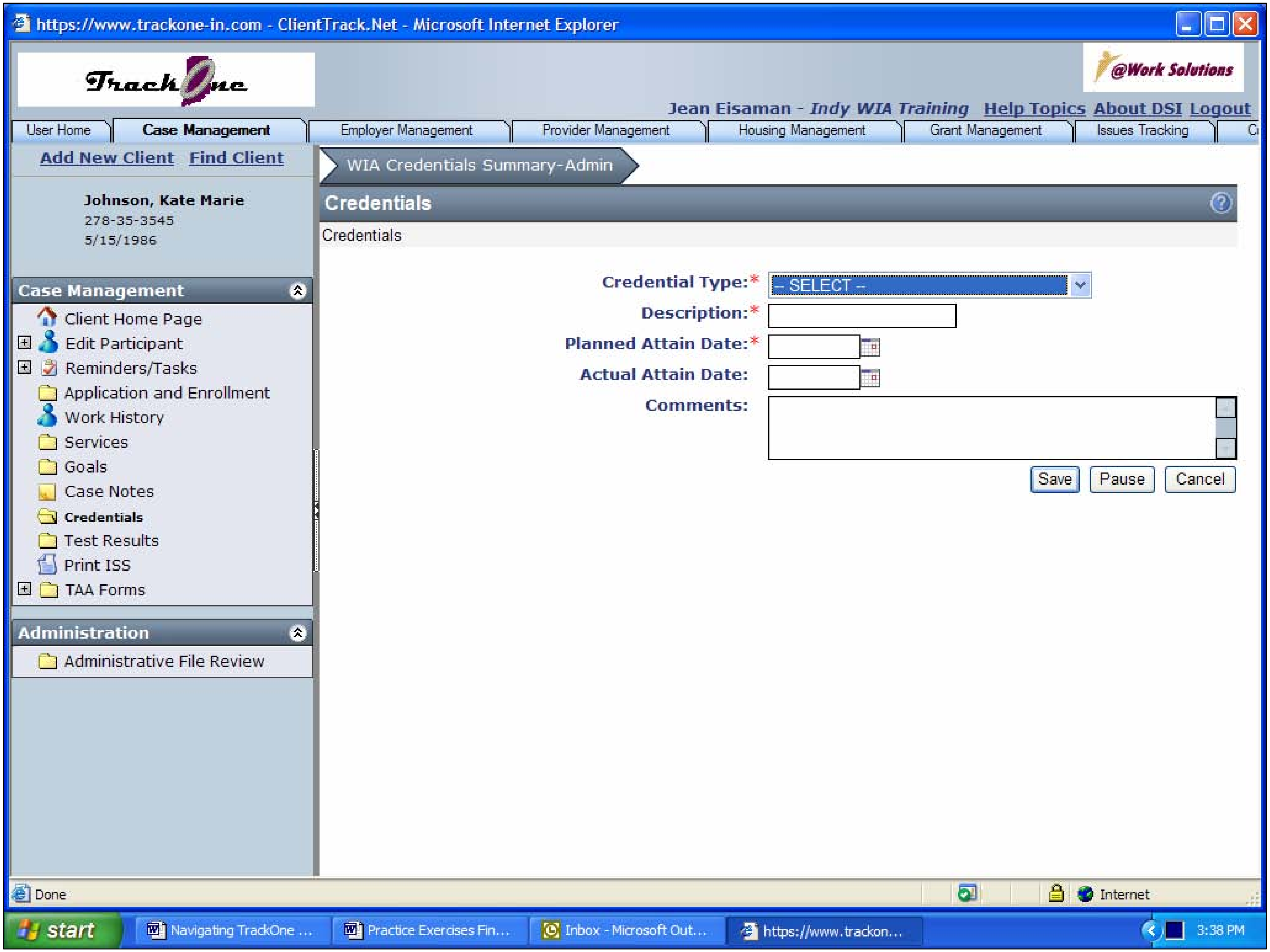
3. Enter Regarding information.
4. Enter the Case Note.
5. Click **Save**. Note that saved case notes cannot be modified.

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



Procedure

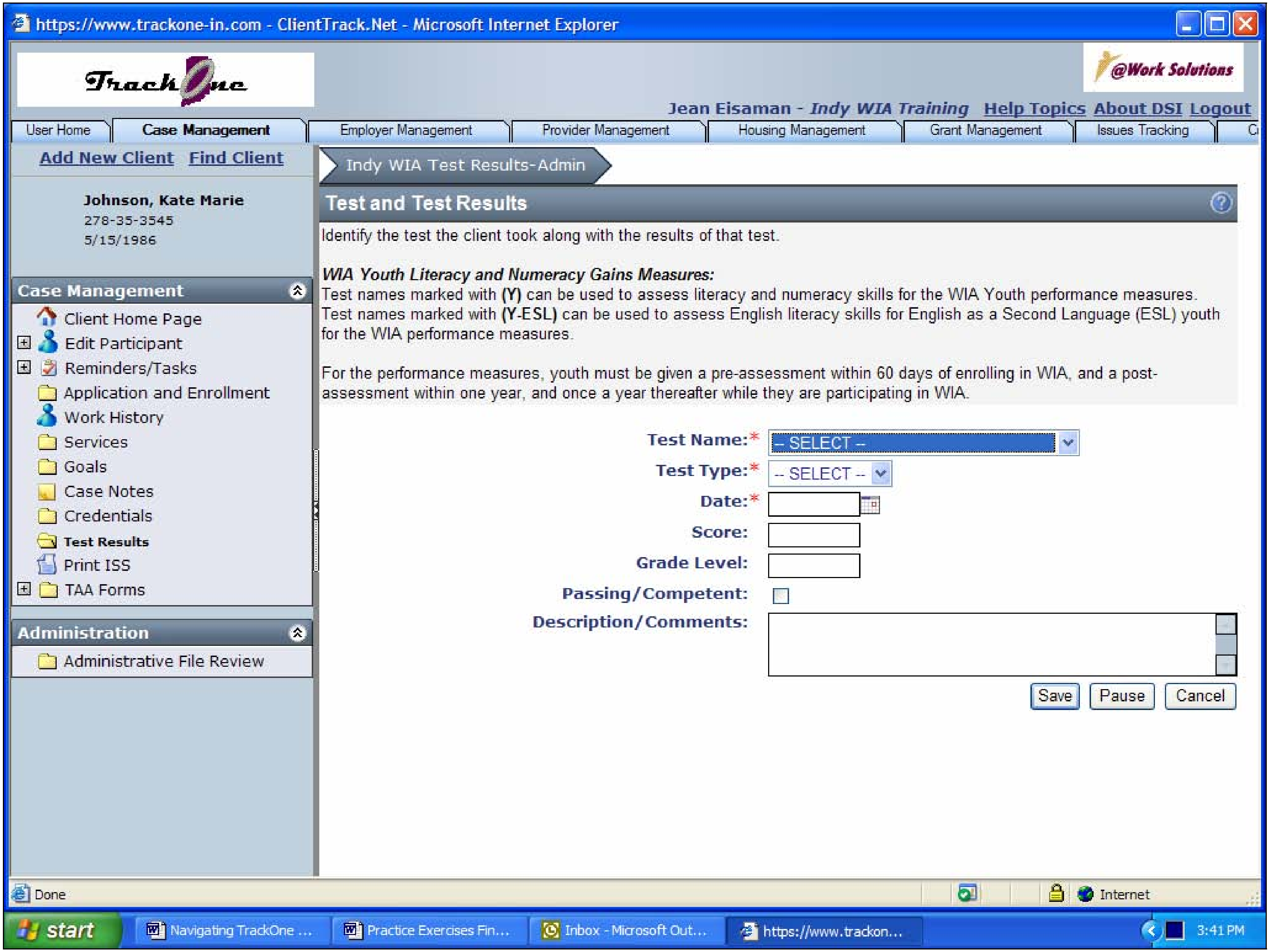
1. Click **Credentials** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Select the Credential Type by using the drop-down menu.
4. Enter the Description.
5. Enter the Planned Attain Date. Actual Attain Date will be entered upon completion of the Credential.
6. Enter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



Procedure

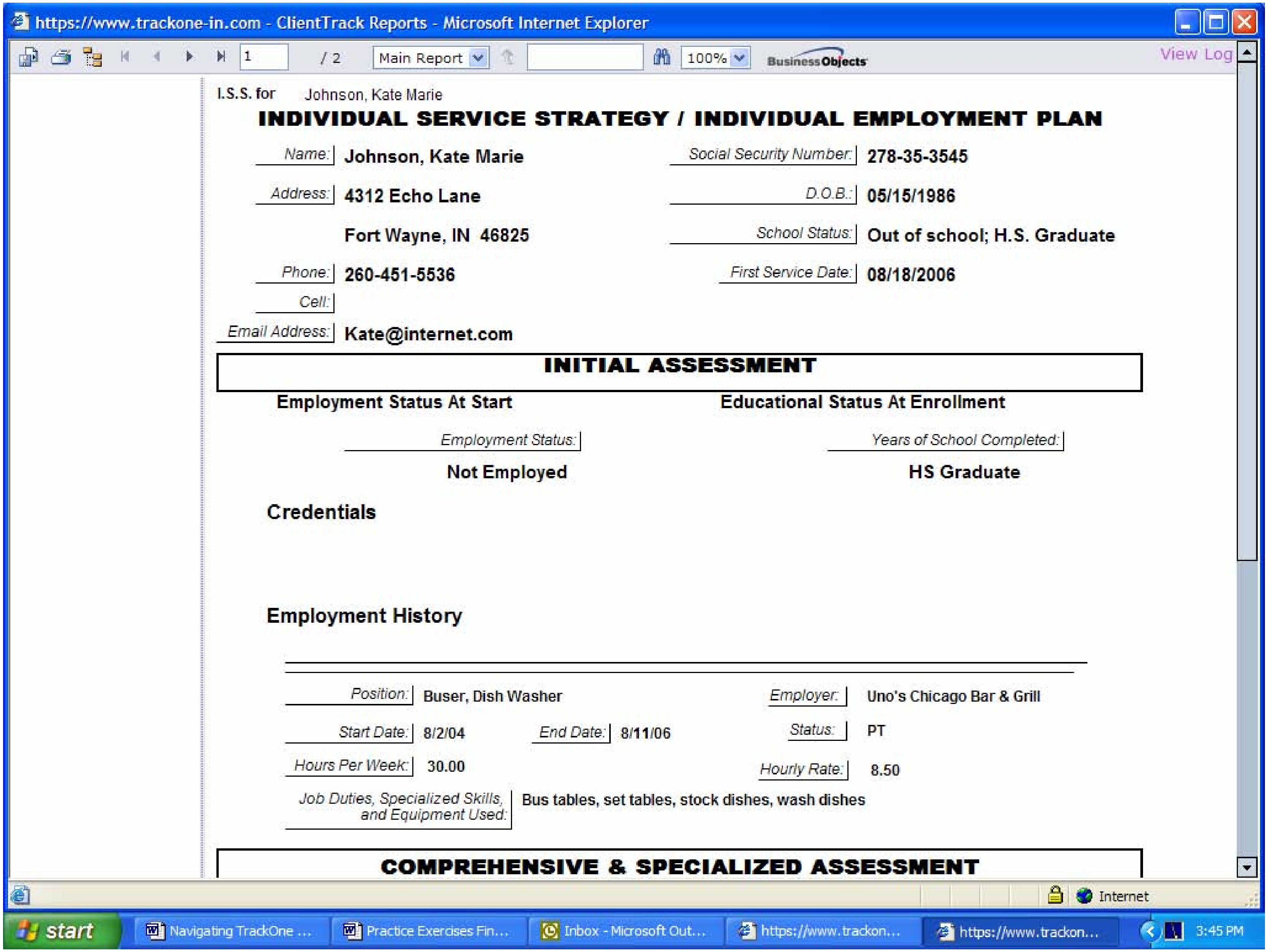
1. Click **Test Results** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter the Test Name by using the drop-down menu.
4. Enter the Test Type by using the drop-down menu.
5. Enter the Date (mmddyyyy).
6. Enter the test Score.
7. Enter the Grade Level achieved based 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)



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
Fort Wayne, IN 46825
D.O.B.: 05/15/1986
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

Employment Status: Not Employed

Educational Status At Enrollment

Years of School Completed: HS Graduate

Credentials

Employment History

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

COMPREHENSIVE & SPECIALIZED ASSESSMENT

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.

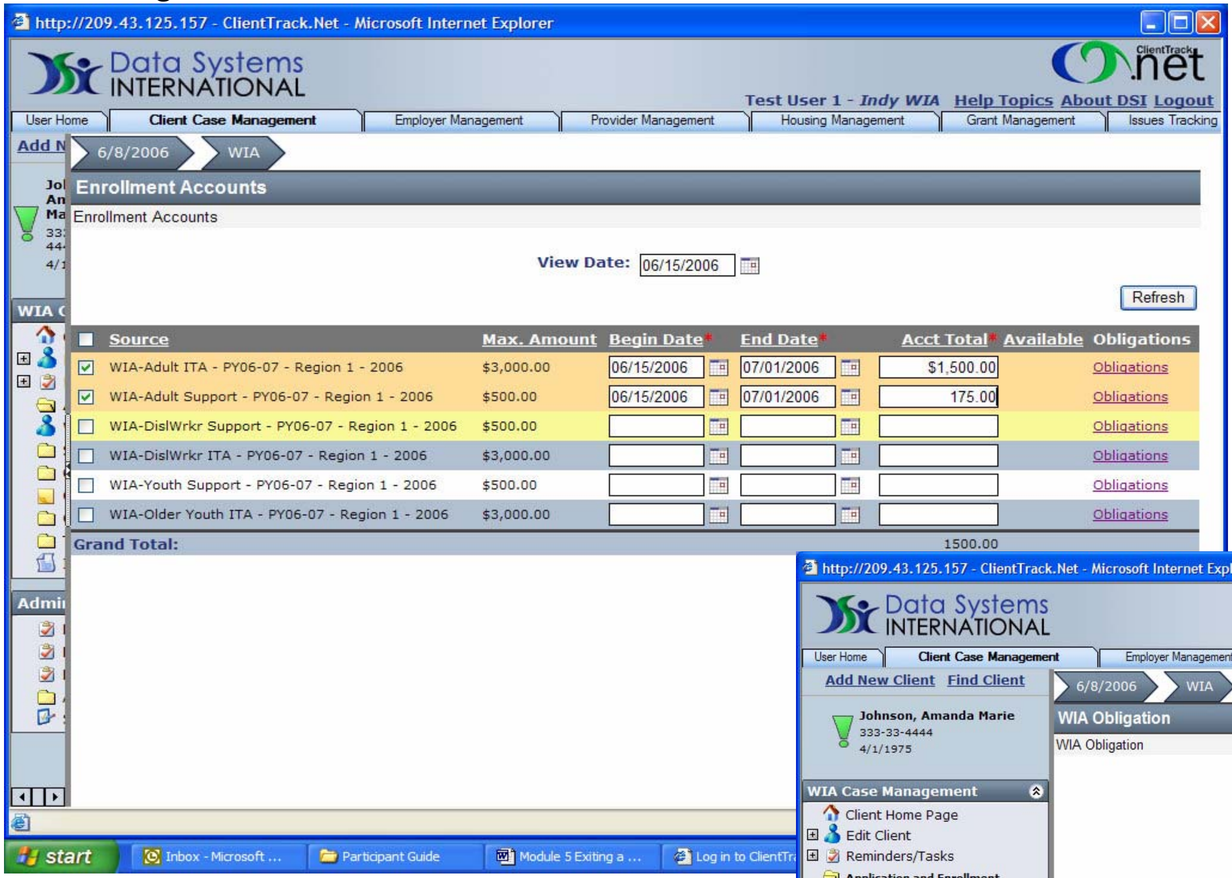
Just as TrackOne has an integrated application across programs, it has an integrated ISS.

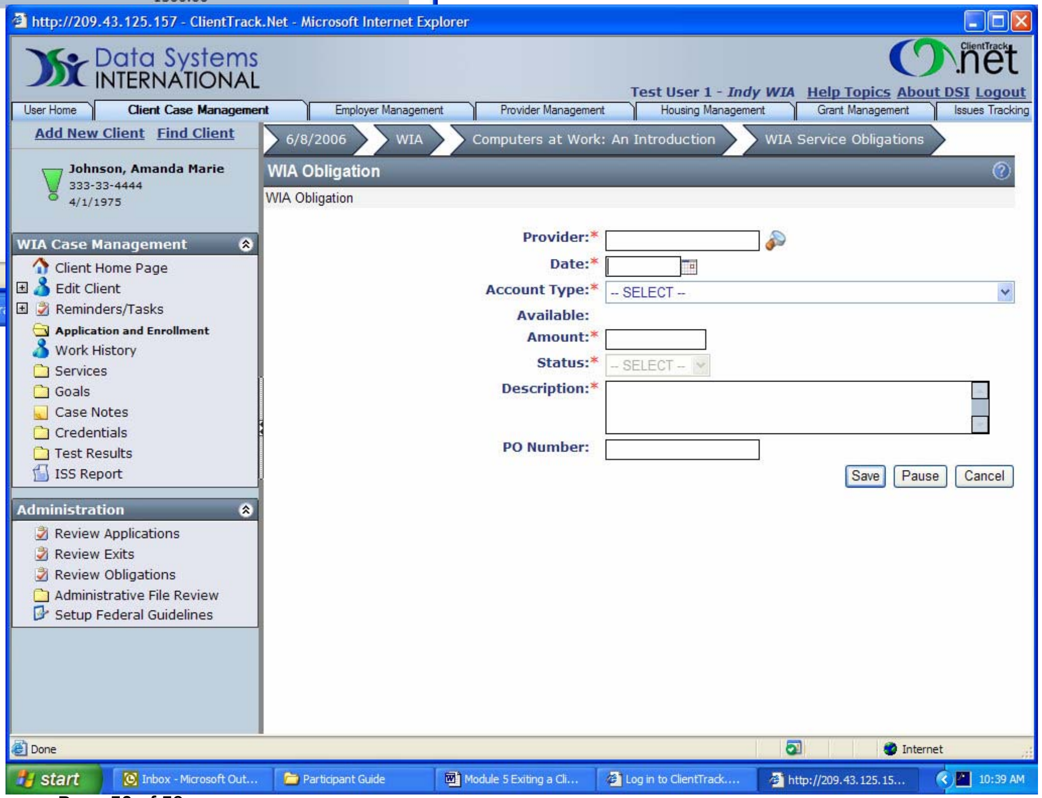
Note: The ISS is not in final format. It will change when WP and vets are brought on to system. DWD is o.k. with everyone using it in current format.

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

Next…Training Enrollment

Training Enrollment





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

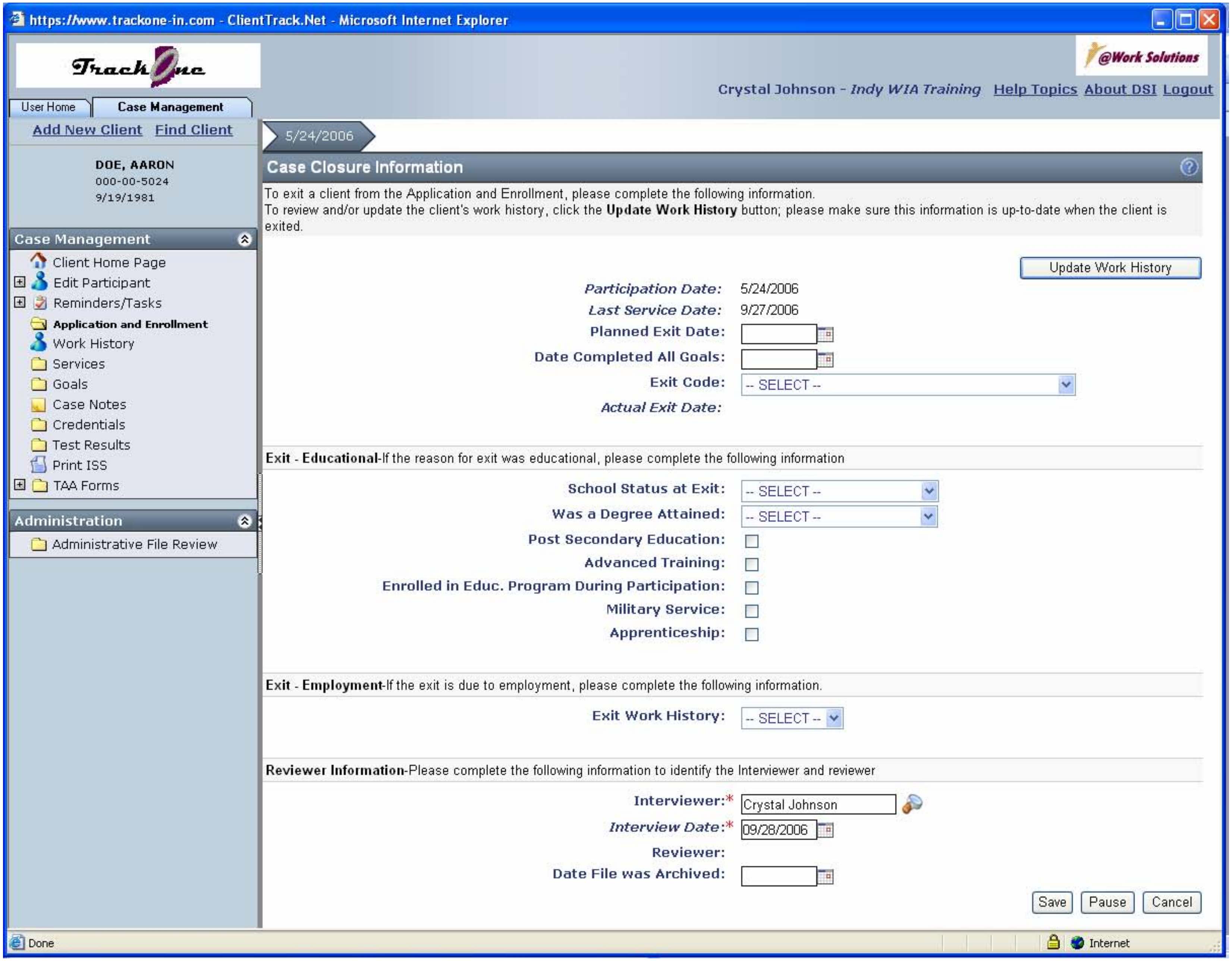
Follow the steps we've reviewed before to add the service. **Important!** Be sure to select program enrollment to get obligation to work.

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



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:

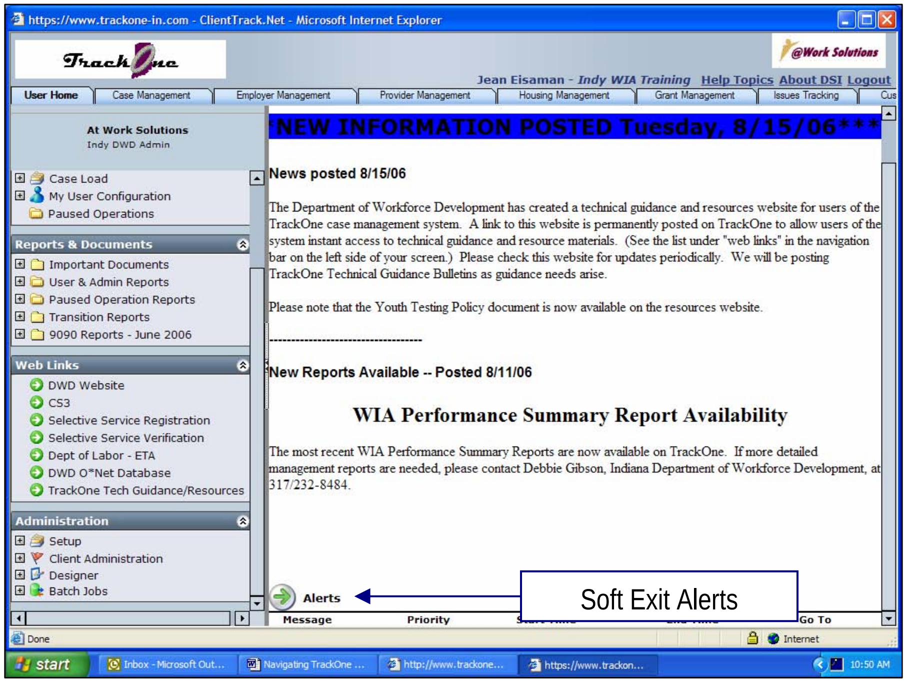
Managing Alerts

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