OFFICE OF THE CHIEF INFORMATION OFFICER

Employment and Training Administration (ETA)

Senior Community Service Employment Program (SCSEP)

Grantee Performance Management System (GPMS)

User Guide for Grantees

Version 1.4

August 2023

RESPONSIBILITIES

Role	Name	Email
Federal Program Manager	Steven Rietzke	rietzke.steven@dol.gov
Federal Project Manager	Ravi Kotti	kotti.ravi.c@dol.gov
Federal Product Owner	Toni Wilson	wilson.toni@dol.gov
Project Manager	Akash Sangroula	sangroula.akash@dol.gov
Requirements Analyst	Akash Sangroula	sangroula.akash@dol.gov
Contracting Officer's Representative (COR)	Angela Bai –	bai.angela@dol.gov
	Irene Jefferson – for BCT Partners	jefferson.irene@dol.gov
Subject Matter Experts	Michi McNeace	mcneace.meche@dol.gov
	Sheldon Bond	bond.sheldon@dol.gov
	Shelly Rose	rose.shelly.a@dol.gov
	Matt Potts	potts.matthew.s@dol.gov
	Denise Thompson	thompson.denise@dol.gov
	Bennett Pudlin	bpudlin@charteroakgroup.

DOCUMENT INFORMATION

Title:	SCSEP GPMS User Guide
Revision:	Release 0.04
Issue Date:	August 14, 2023
Contract Number:	1605DC-17-C-0014
Doc Type:	Non-Contractual
Doc Classification:	For Official Use Only

Table of Contents

SUMMARY OF CHANGES

Date	Description
01-20-23	The updated user guide includes guidance and information on: • Entering and managing safety consultation and assessment information. • Management of eligibility approval process. • Entering and managing organization and contact information. • Guidance on the generation of Internal Quarterly Progress Reports (QPR). • Generation of Management Reports. Information surrounding various forms was also updated to reflect the current state of the application.
08-14-23	

Introduction

Authorized by the **Older Americans Act (OAA)**, originally enacted in 1965, the **Senior Community Service Employment Program (SCSEP)** (sometimes referred to as Title V), funded and administered by the **Employment and Training Administration (ETA)** of the **U.S. Department of Labor (DOL)**, is the oldest nationally directed, community service, and work-based job training program designed to help low-income, unemployed individuals, aged 55 and older find work by matching job seekers with part-time training assignments in local nonprofits and public agencies where they can increase their skills and build self-confidence and self-sufficiency while earning a modest supplemental income. SCSEP is designed to be used in conjunction with other programs and services to provide training, increased marketability, and opportunities for transition into non-subsidized employment. Based on their needs, employment interests, and goals, participants may also receive supportive services and skills training. This **SCSEP** experience may lead to permanent employment.

Program participants work an average of 20 hours per week, are paid at least the federal minimum wage (with exceptions) and gain work experience in a wide variety of community service activities at non-profit and public agencies, including schools, hospitals, day-care centers, and senior centers. This training serves as a bridge to civic engagement and skills enhancement and leads to unsubsidized employment opportunities for participants.

SCSEP is one of three federal workforce development programs and serves nearly every county in the nation.

Goals of SCSEP

The goals of the **SCSEP** application are to:

- Upgrade the job skills of participants
- Provide added income to participants during training
- Help participants become more involved in their community
- Provide the local program community with needed service
- Assist participants with transition to unsubsidized employment or other forms of self-sufficiency

Services Provided to SCSEP Participants

Services provided to participants include:

1. Periodic assessments and an **Individual Employment Plan (IEP)**
2. Improved living situation through paid training while preparing for future unsubsidized employment
3. Connection with peers and their community and helping to address community needs
4. Increase in job skills and work experience through community service assignment and by attending specialized training sessions and on-the-job experience
5. Exploration of employment opportunities in their labor market
6. Additional skill improvement through related programs and partner agencies

Case Management Overview

SCSEP serves as the primary source for entering, tracking, and submitting program **Participant** data in a more efficient manner, providing visibility and reporting capabilities for the data captured for Participant cases. **Participant** data is then fed into the quarterly and annual **Quarterly Progress Report (QPR) through the WIOA Integrated Performance System (WIPS)**. The **Program Year** is **July 1 through June 30** of any given year. **Employment Outcomes** are measured in program quarters: 1st quarter (Jul-Sept), 2nd quarter (Oct-Dec), 3rd quarter (Jan-Mar), 4th quarter (Apr-Jun).

Document Overview

This **User Guide** consolidates information and instructions for use of **SCSEP**, including information specific to each user role, and serves as a vehicle for documenting the various management areas/processes within the **SCSEP Grantee Performance Management System (GPMS)** (e.g., the methodology, allocated resources, management processes and procedures, operational tasks and review activities, and interrelationships with other documents (as necessary)). This Guide is intended for use in conjunction with other guides and handbooks, including the Data Collection Handbook, the Data Validation Handbook, and the QPR Handbook. This document will be updated as necessary whenever there are changes to GPMS.

Help Desk

If any issues are encountered with the **SCSEP GPMS**, contact scsephelp.zendesk.com.

SCSEP GPMS Core Functional Requirements

The SCSEP GPMS is deployed on top of the ***Appian*** COTS platform that supports the **Case Management** lifecycle. The **SCSEP GPMS** leverages **WIPS**, an existing shared service designed to meet **WIOA** reporting standards. Together, **SCSEP GPMS** and **WIPS** support the **Case Management** lifecycle through all phases. Several functional requirements are addressed including, but not limited to, the following:

Functional Area	Description
User Management	Using the security module, administrators may grant and restrict user access to the features and functions of theapplication for individual users based upon role.
Case Management	Allows users to add, update, track, and delete Cases through the completion of their workflow.
Eligibility Verification	Allows users to ensure that Participants meet the Eligibility requirements.
Services Management	Allows users to add, update, delete, and track services, including program required services, supportive services, and paid training provided to participants.
Outcome Management	Allows users to add, update, delete, and track Participant outcomes.
Exit Management	Allows users to Exit participants based on pre-defined requirements.

Functional Area	Description
Follow-Up Management	Allows users to add, edit, delete, and track follow-up services provided to program participants.
Reporting	Provides standard reports that support DOL reporting requirements for internal and external users, allowing them to create reports that are pertinent to their roles.

User Roles

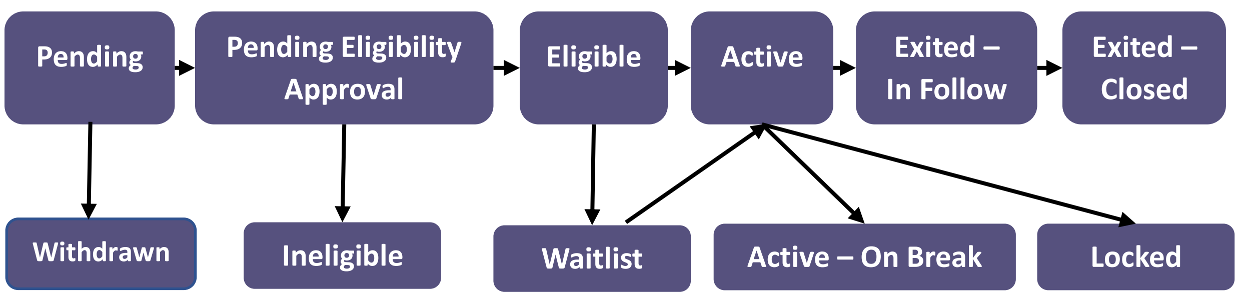
Within the **SCSEP GPMS**, the following **User Roles** are identified:

Role Name	Abilities
Case Manager	• Primary users who move the **Case** through the **Intake**, **Eligibility**, **Service**, **Exit**, and **Outcome** milestones. • Ability to add, edit, and read throughout the system. • Ability to create new **Cases** for their organization and to update the details of those **Cases** assigned to them. • Not permitted to submit **Quarterly Progress Reports (QPRs).**
Case Supervisor	• Users with all **Case Manager** Privileges plus the ability to reassign **Cases** and **Case Managers**. • Ability to create **Users** with any role except **Grantee or Sub-Grantee Administrator.** Ability to assign/reassign cases to **Case Managers.** • Ability to add, edit, delete and read throughout the system. • Ability to review and approve eligibility determination. • Ability to request re-certification of a **Case.** • Not permitted to submit **QPRs.**
Sub-Grantee Administrator	1. Users with all the privileges of a **Case Manager** (see above) with the ability to review/edit **Case-related** information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move **Cases**; to approve re-certifications requested by the **Case Supervisor**; and to submit **QPRs.** 2. **Sub-Grantee Administrators** inherit all permission of the **Case Supervisor** along with the ability to manage the set of users that have access within their sub-grant 3. Ability to create **Users** with any role except another Sub-**Grantee Administrator or Grantee Administrator.** 4. Ability to assign/reassign cases to **Case Managers.**
Grantee Administrator	1. Users with all the privileges of a **Case Manager** (see above) and above can review/edit **Case-related** information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move **Cases**; to approve re-certifications requested by the **Case Supervisor**; and to submit **QPRs.** 2. **Grantee Administrators** inherit all permission of the **Case Supervisor** along with the ability to manage the set of users that have access within their grant. 3. Ability to create **Users** with any role except another **Grantee Administrator** Ability to assign/reassign cases to **Case Managers.**
Program Analyst	1. **Program Analysts** are those users located within the **National Program Office** 2. Ability to view all **Grantee Organizations**

Role Name	Abilities
	3. Ability to designate the **Grantee Administrators** ***4.*** Ability to delete a case ***5. NOTE: Only Program Analysts can View or Edit (PII) information after it has been entered/saved in the application***
Read Only Global	1. User will have **View Access** to all the Grantee/Subgrantee information GPMS. 2. If a user is provided with Read Only Global access for a grantee, the same user cannot be provided with Read Only Restricted access (see below) for a specific Subgrantee with the same grantee 3. User can view all Cases, Tasks, Limited access to Admin Console and Reports. 4. User can create and export reports, however, cannot export the extracts 5. Does not have the ability to create cases or edit existing cases
Read Only Restricted	User has the same access as Read Only Global but only for their specific Grantee.

Case Status

Within the **SCSEP GPMS**, the **Case Statuses** in the following figure are used. Each Status is further defined in the table.



Status	Description
Pending	**Case** has not been submitted for **eligibility determination.** **Case Status** is updated to ***Pending*** when the **Case Manager** has completed the **Case** creation process, but the **Participant** has not been moved through all of the **Intake** process steps.
Withdrawn	**Case** has not been submitted for eligibility determination and user has selected Withdraw from the related actions screen.
Pending Eligibility Approval	An **Eligibility** determination decision has not been made. A **Task** for **eligibility approval** has been created by the **User** (and sent to the **Case Supervisor**), but eligibility has not been approved.
Eligible	**Case Status** is updated to ***Eligible*** when an **Eligibility** approval has been granted by the **Case Supervisor**.

Status	Description
Ineligible	**Case Status** is updated to ***Ineligible*** if the **Case Supervisor** deems the **Case** to be disqualified due to specific program requirements.
Waitlist	When the **Case** is determined to be ***Eligible***, the **Case** is placed on a ***Waitlist*** until a **Community Service Assignment** is available.
Active	**Case Status** is updated to ***Active*** after **Eligibility** has been approved by the **Case Supervisor**, the **Program Orientation Date** has been added, and an **Assignment** has been added, meaning the **Case** has been assigned to a **Host Agency** for a **Community Service Assignment**.
Active – On Break	An active **Case** has a **Break in Service** where the system date is between the **Break Start Date** and the **Break End Date**.
Locked	A **Case** has been locked for exceeding the **Durational Limit**.
Exited – In Follow-Up	A **Case** has been **Exited** for <u>unsubsidized employment</u> and has a **Placement** associated with it. **Follow-Up** is only relevant for Enrollments that have a **Placement**. When **Case Status** is ***Exited – In Follow-Up***, access is limited to the **Summary**, **Services**, **Outcomes**, **Follow-ups**, and **Related Actions**.
Exited – Closed	A **Case** has been **Exited** for a reason other than unsubsidized employment.

Universal Features

This section provides information on the basic functionalities found throughout the **SCSEP GPMS**. These structures include:

Role Name	Abilities
Tabs	A sequence of identifiers across the top of the screen that provide a **Menu** of options.
Navigation Buttons	A sequence of buttons at the bottom of the page to navigate the user from page to page.
Dropdown Lists	Provide a list of allowable values for the field, thereby limiting the selection.
Field-Level Help	Alert the user to the nature of the data to be entered for various fields
Required Fields	An asterisk (*) directly next to a field label is used to identify fields where mandatory information is required to proceed
Calendar Buttons	A calendar format is provided to select a date.
Upload Documents	A button used to begin the attachment of an external document to the **Case.**
Error & Warning Messages	Used to display required or recommended actions or errors in data.

Tabs

Various **Tabs** provide a **Menu** located across the top of the screen when logged into the **SCSEP GPMS** application, as shown in the following images:

Users navigate through the **SCSEP GPMS** application using these tabs:

Tab	Explanation
Cases	All the cases created are by the user can be found here.
Admin Console	Available to administrator roles. See permission matrix for details
My Tasks	Actions that require the user's attention.
Reports	Provides access to a list of reports available to the user to monitor organizational programs.
Grantees	Available to Program Analyst roles.

Navigation Buttons

Navigation Buttons provide a simple method for the user to move through the various screens.

Button	Function
Close	Closes the page without saving the information and returns to the main overview page.
Save + Continue	Saves the information and proceeds to the next page.
Save + Close	Saves the information, closes the page, and returns to the main overview page.
Continue	Proceeds to the next page.
Previous	Returns to the previous page without saving the information.
Complete	Saves the information and completes the case intake process.

Dropdowns

Dropdowns are used to provide a pre-determined list of allowable values and to ensure that only those values are selected and entered the **SCSEP GPMS**. Depending on the specific Dropdown, only one value may be selected, or multiple values may be selected.

Field-Level Help

Any field marked with a **question mark** ( ) contains **Field-Level Help** that is displayed when the user ***hovers over the question mark***. At that time, the help text will be displayed, indicating specific instructions or data validation limits on the field in question. No action is required on the part of the user.

When the user ***hovers over the question mark*** ( ), the **Field-Level Help** is displayed (displayed below).

Required Fields

Any field with an **asterisk** ( ) next to it is mandatory and requires user input before moving forward or saving the data entered on the screen. In all instances, the page and its data will not be saved until all the required fields are populated with valid data. If the user attempts to save the data by selecting ***SAVE+CONTINUE*** with no data entered into the required fields, a message will be displayed. The user will not be able to move forward by selecting ***SAVE+CONTINUE*** until required fields are populated with valid and appropriately formatted data.

Calendar Buttons

When entering dates into the **SCSEP GPMS**, users may either type the date directly into the appropriate field or use the ***Calendar*** button to select a date. Dates are displayed in the standard MM/DD/YYYY format. When selecting the **Calendar** button, the current month is initially displayed. Use the arrows (**<** and **>**) to navigate to the correct date before selecting the ***Enter*** key.

Upload Documents

When adding any document to the **Case**, the user will be prompted to select the ***Upload*** button. Once the **Upload** button is selected, the user is prompted to choose one or more files from their local hard drive, using the file browser, before selecting the ***Open*** button to execute the upload. This action can be repeated for additional files.

At present, only Microsoft Excel files are allowed to be uploaded to the **SCSEP GPMS**.

Grids

Grids are used in the **SCSEP GPMS** application to display rows of data in a tabular format. **Grids** also allow users to select a specific item for further viewing or action. In some instances, **checkboxes** are displayed allowing the user to select a specific row from a grid with which to work. At other times, the user can select a **link** associated with the data row to move directly to that row's data.

In many cases, the **Grid** may contain an arrow (pointing up and down) within the header row indicating that data within the grid can be sorted in either ascending or descending order. Select the arrow next to the title in the grid's header row to sort the data. Select the arrow next to the title in the grid header again to sort in the reverse order.

When a **Grid** has a large number of rows, the number of rows is displayed in the bottom right corner of the page. To move quickly between the grid's results, select the arrows to move forward (**>**) or backward (**<**). To move quickly to the first or last screen of grid results, select the arrows to move forward/end (**>>**) or back/beginning (**<<**).

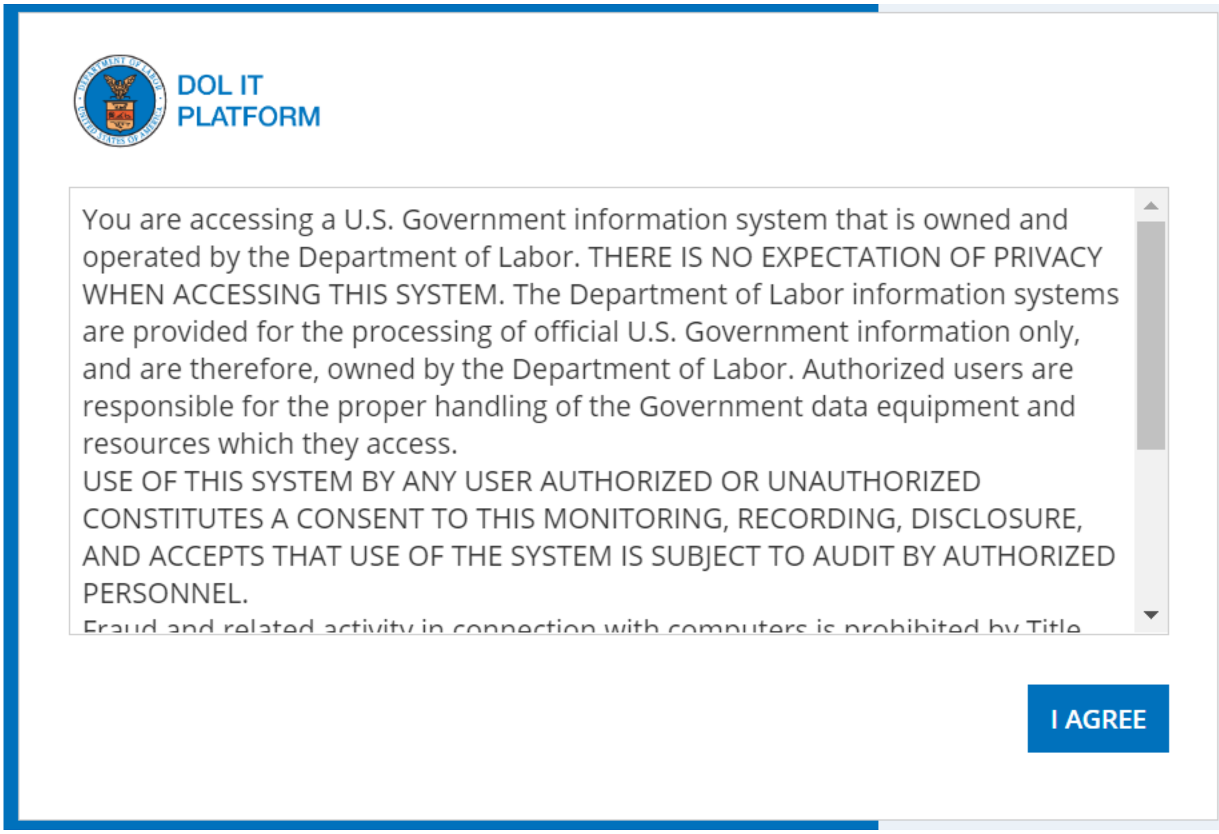
Error and Date Validation Messages

The SCSEP GPMS displays **Error Messages** when the user is required to take corrective action before moving forward. **Data Validation Messages** are displayed for user information and do not require corrective action before moving forward and appear on the data entry screen while the data is entered.

Start Up

To access the **SCSEP GPMS**, **click here**

1. . The screen will display a **U.S. Department of Labor Disclosure Statement**.



2. Read the **Rules of Behavior**.
3. Select ***I AGREE*** to agree to the **Rules**.

   If you already have credentials for the application, proceed to step 5. If not, follow the instructions in the Login-gov instructions.docx

4. Enter the **Username** and **Password**.
5. Select ***SIGN IN***.

Navigating SCSEP

When a **User** accesses the **SCSEP** application, a menu consisting of four **tabs (5 for Program Analyst)** is displayed across the top of the screen. The tabs displayed may change slightly depending on the **User's** role and access privileges; however, the following menu is the one that you will see most often.

SCSEP Cases

(Note: Not all roles are authorized to perform all the actions documented here)

The *CASES* tab brings the user to the *SCSEP Cases* screen. The *SCSEP Cases* screen displays a grid of SCSEP participant cases currently or previously enrolled within the user's grantee(s) and sub-grantee(s).

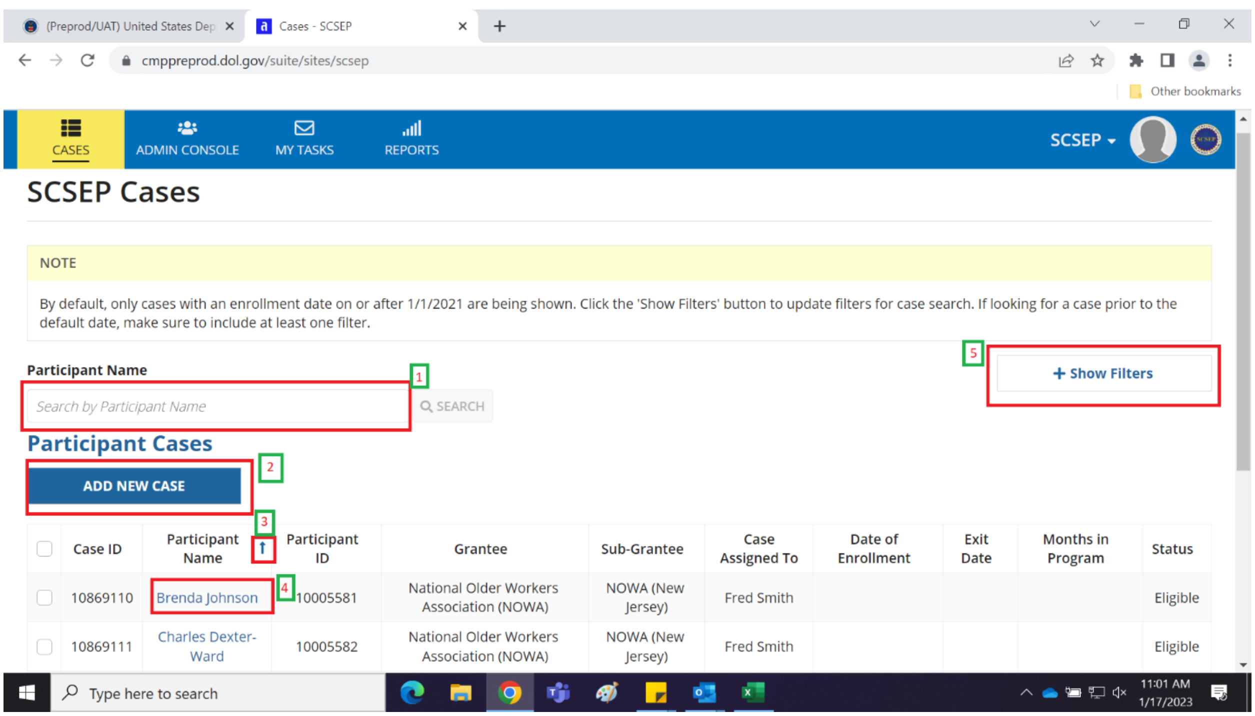
Below the SCSEP Cases heading, the following text is displayed in a Note box with a yellow border:

> By default, only cases with an enrollment date on or after 1/1/2021 are being shown. Click the Show Filters button to update filters for case search. If looking for a case prior to the default date, make sure to include at least one filter.

The cases presented to users are based on their user role:

All users will see all cases connected to the sub-grantee(s) with which they are associated.

Grantee Administrators – Will see all cases associated with the grantee they administer.



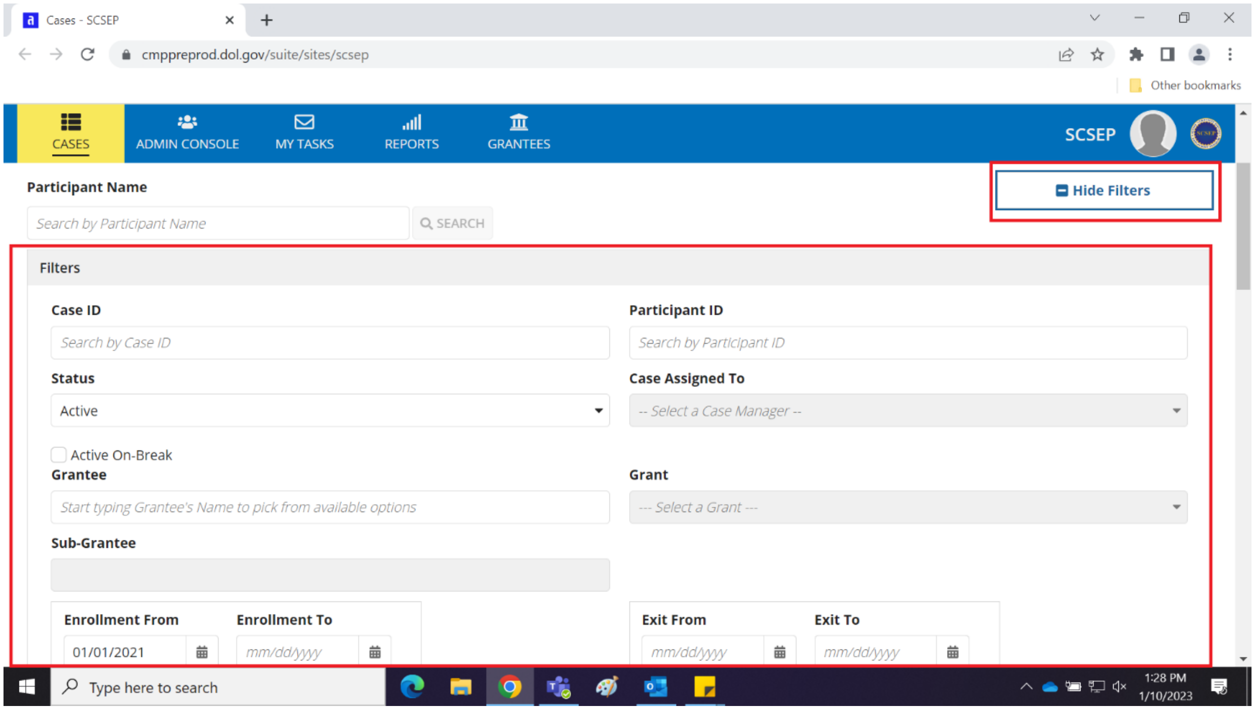
Each of the functionalities available under the *CASES* tab will be discussed in the sections related to the case entry and development/handling process.

1. **Search** – The ***Participant Name*** search allows the user to search all participants based on any part of the Participant Name.
2. **Add New Case** – The ***ADD NEW CASE*** button allows the user to begin the process of entering a new case for a new or existing participant into the system.

3. **Sort Arrows** – The sorting arrows (↑– ascending and ↓ – descending) can be used to sort the participant cases in the desired order.
4. **Participant Name** – The ***Participant Name*** link can be used to immediately open the record for display and editing.
5. **Filters** – the ***Show Filters*** link allows the user to specify a range of possible items with which to limit the displayed cases within the grid (the default is to display all).

   The window below appears if a user clicks **Show Filters**. The following additional filters are available to all users:

   – Case ID
   – Participant ID
   – Status – User can select one or many statuses from dropdown.
   – Case Manager – User can select cases assigned to a particular case manager. This field can only be selected once a Sub-Grantee is selected.
   – Grantee
   – Sub-Grantee – User can only select a sub-grantee after the grantee has been selected.
   – Grant (Informational) - When the user selects a sub-grantee, from the sub-grantee filter, the filter displays a Grant Number associated with the grantee/sub grantee.
   – Enrollment Date From – User can select cases where the enrollment date is on or after the entered date.
   – Enrollment Date To – User can select cases where the enrollment date is on or before the entered date.
   – Exit Date From – User can select cases where the exit date is on or after the entered date.
   – Exit Date To – User can select cases where the exit date is on or before the entered date.



1. Add New Case

The following sections provide guidance on adding a new case to the system. Some specific programmatic rules for each data element will not be outlined in this manual. Refer to the SCSEP Data Collection Handbook for guidance on how to best capture and record information, and how the data elements relate to the SCSEP performance measures. Below are some general guidelines found throughout these sections.

Fields marked with an asterisk (*) are mandatory. Users will not be able to save the record until mandatory fields are populated.

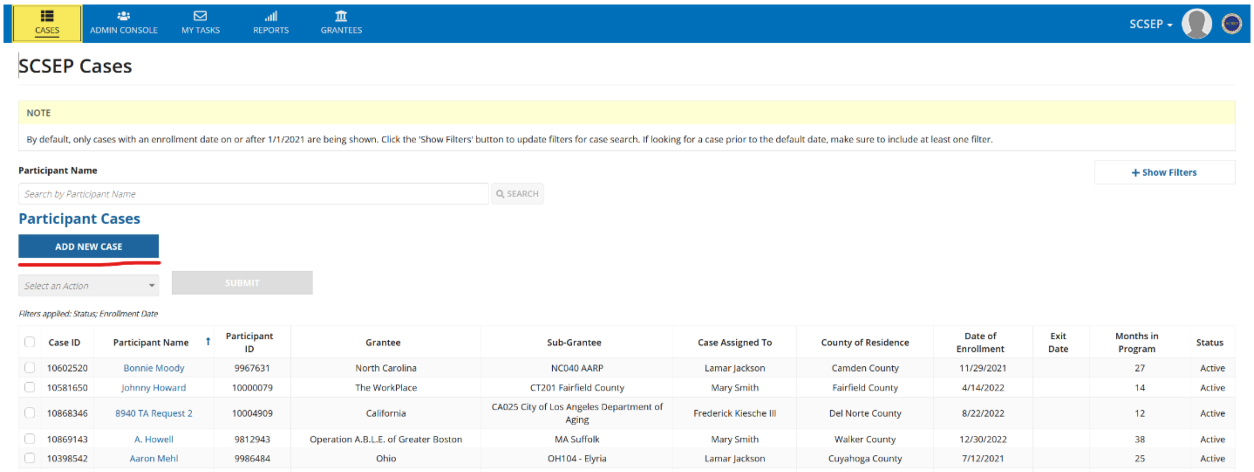
Some fields provide additional information regarding how they are populated. In these cases, the hyperlinked text **Show Detailed Instructions** displays below the field. When clicked, a text box displays additional information regarding the field. The text will also change to **Hide Instructions**. Clicking Hide Instructions will close the text box.

When clicking the complete button in this and other sections of case data entry, the text Action Completed displays temporarily in a blue text box at the top of the screen.

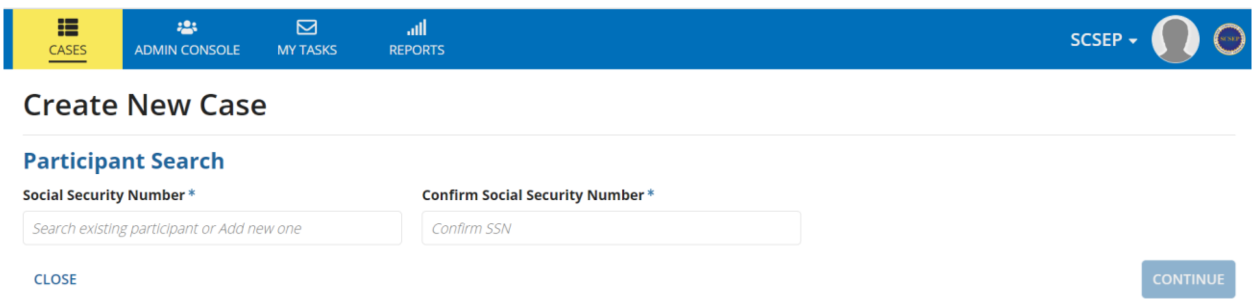
1.1 Intake

All users, except those having a Read-Only role, can add a new case. The process is as follows:

1. To add a new participant or a new case for an existing participant, click on **ADD NEW CASE.**



The system navigates the user to the ***Create New Case*** screen.



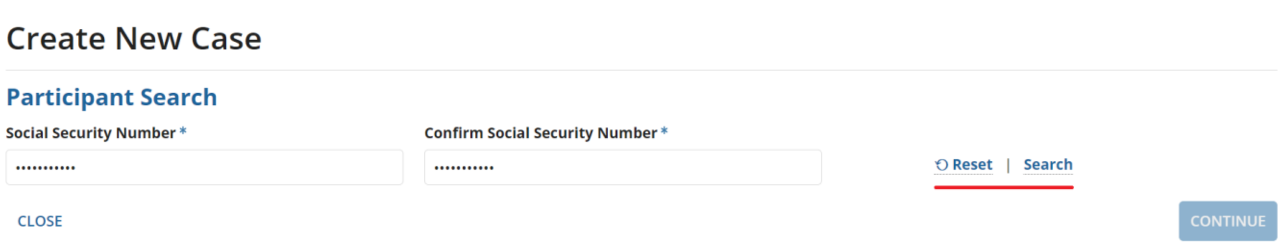
2. Type the participant's Social Security Number (SSN) in the **Social Security Number** field, then re-enter the SSN in the **Confirm Social Security Number** field.

*Note: The participant's SSN will not be visible but will be masked as a series of asterisks *********.*

The system will validate that the SSN is in a valid format and the participant does not already exist in the system based on their SSN.

Once the participant's SSN is entered into the system, it cannot be updated. Contact SCSEP Help for assistance with updating the participant's SSN.

3. Click **Enter** or click anywhere on the screen to view the **Reset** and **Search** links.



- Click **Reset** to clear the SSN from both fields and begin a new SSN search.

- Click **Search** to search for a participant with that SSN.

When **Search** is clicked:

- If the participant's SSN is already in the system, the participant's details are shown along with the message below.

NOTE

- The participant with the Social Security Number that is entered already exists within SCSEP.
- The following participant was found with that Social Security Number. Please continue if you wish to add a new enrollment for this participant.

Case ID	Participant ID	Full Name	Date of Birth	Case Creation Date	Grantee Name	Organization Name	Status
10869109	10005580	Georgina A Jones	1/1/1950	1/17/2023	National Older Workers Association (NOWA)	NOWA (New Jersey)	Eligible

CLOSE CONTINUE

- If the participant's SSN is not in the system, the **Enter New Participant Details** section appears with the message below.

NOTE

- The participant with the Social Security Number that is entered does not exists within SCSEP.
- Fill out the following form to create a new participant.

Enter New Participant Details

First Name * Middle Initial

Last Name *

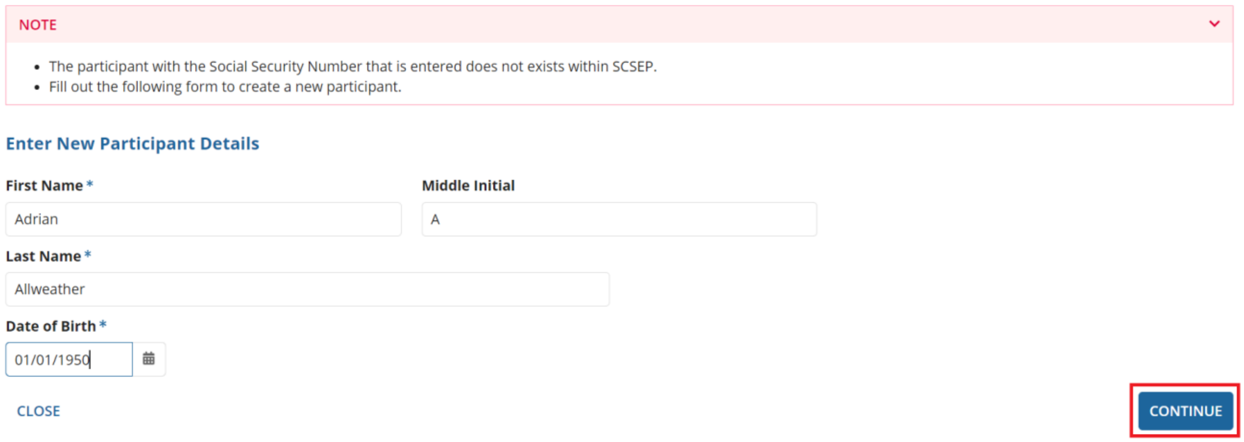
Date of Birth *

mm/dd/yyyy

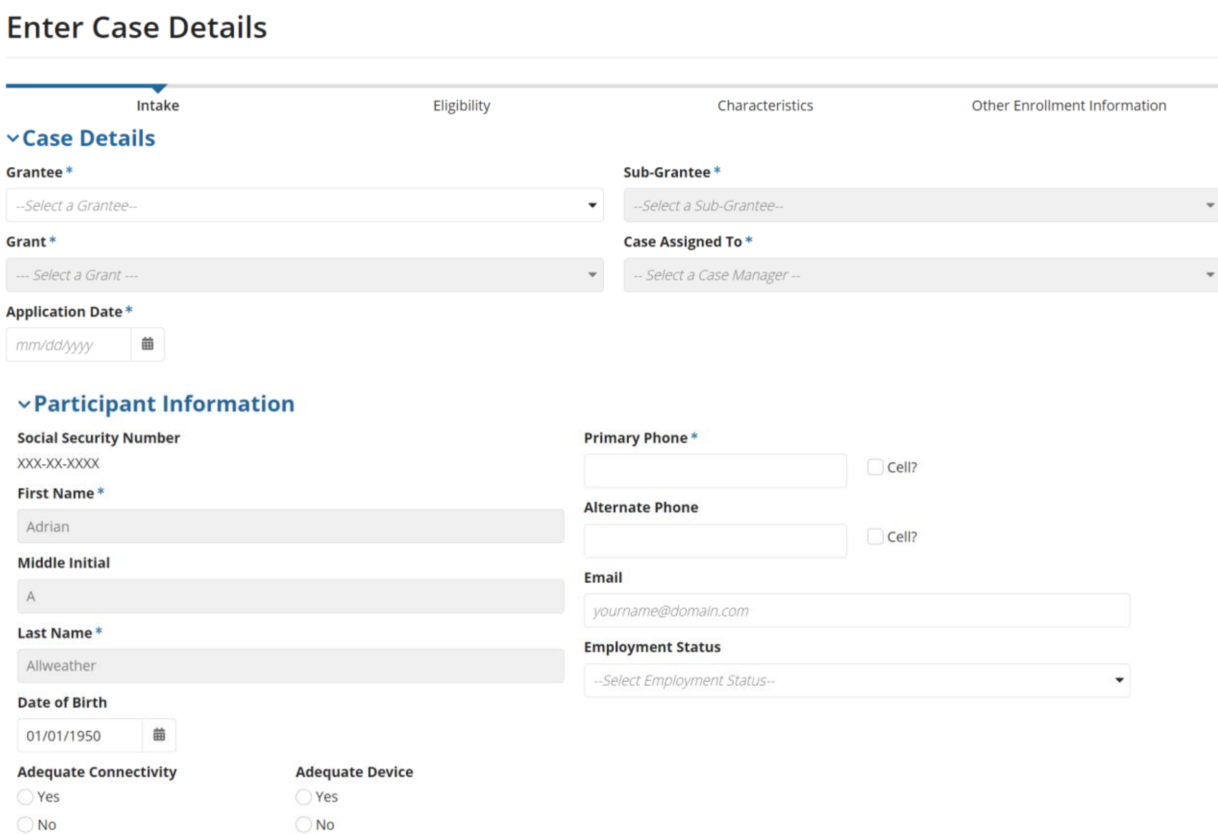
CLOSE CONTINUE

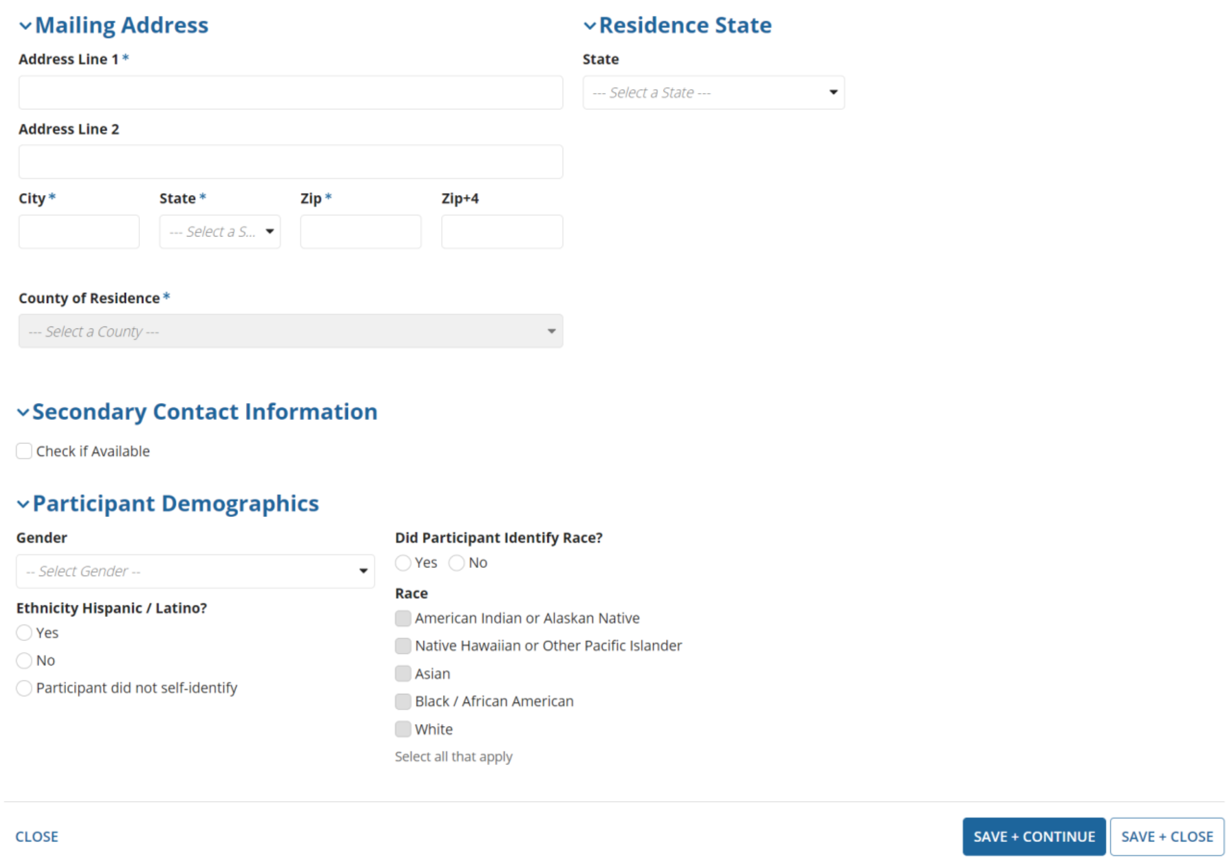
4. Enter the information into the fields on the screen and click **CONTINUE**.

Once the participant's name, Social Security Number, and date of birth are entered into the system, they cannot be updated. Contact SCSEP Help for assistance with updating the information.



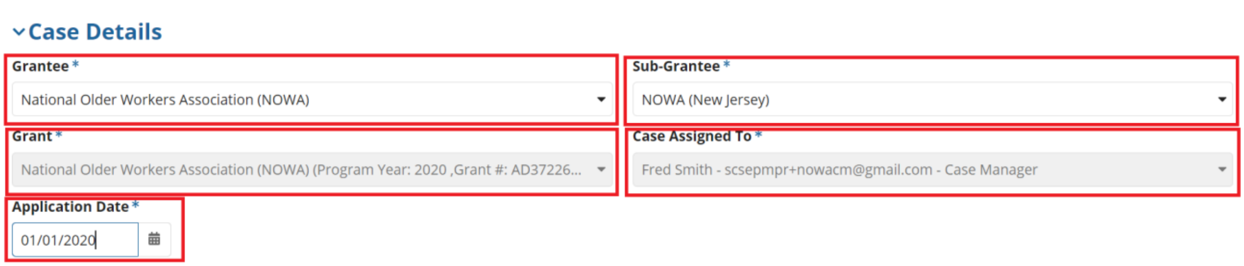
5. The system navigates to the **Enter Case Details** screen.





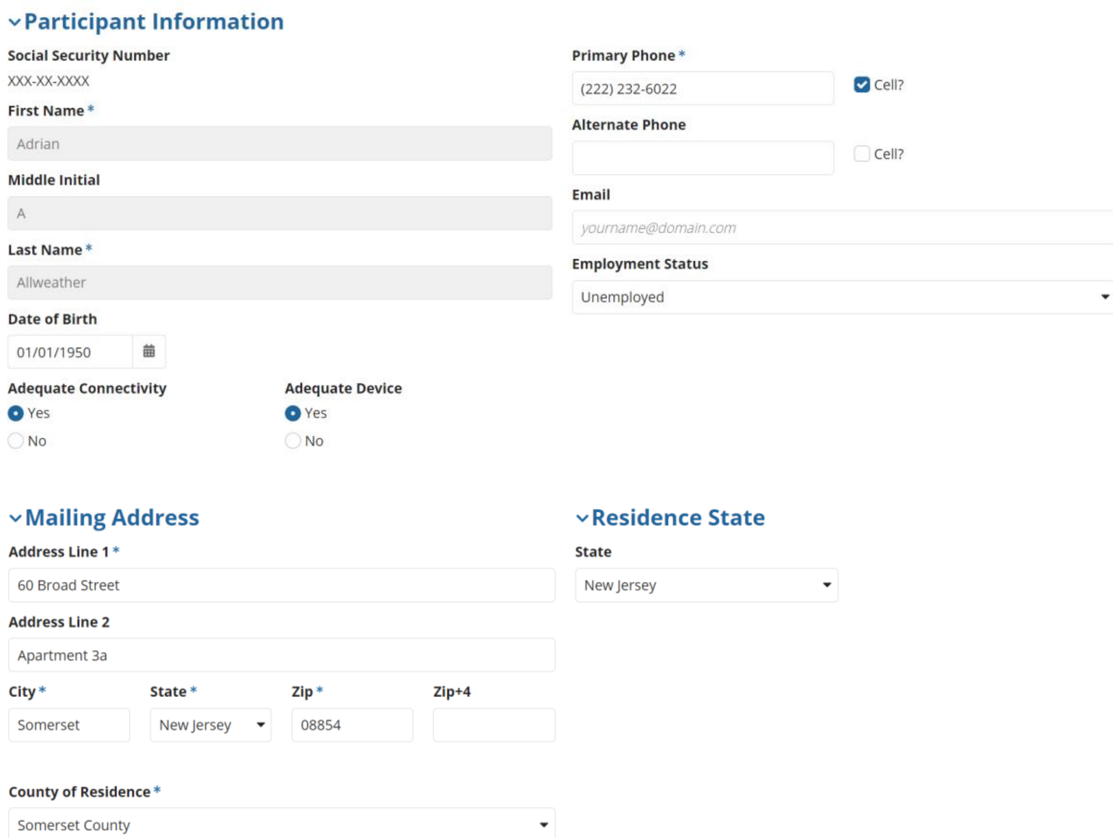
The top of the screen provides a progress bar for the user to track progress while creating a new case. The case module navigates through four screens to create a new case: Intake, Eligibility, Characteristics, and Other Enrollment Information.

Select the grantee, sub-grantee, and grant in which to enroll the participant. If the user has a single role associated with their account, the respective dropdowns default to that grantee and sub-grantee.



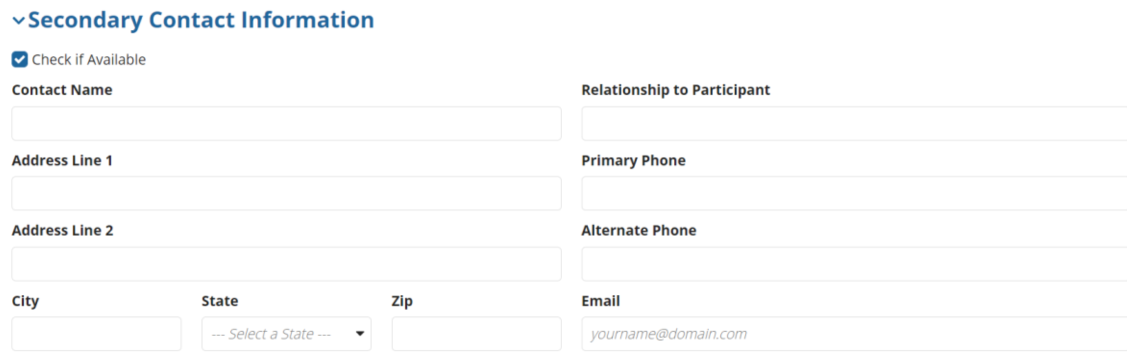
6. Select the case manager assigned to the case. The dropdown defaults to the user if the user is a case manager.
   Once a case is created, it may be reassigned only by a supervisor or an administrator.

7. Enter the participant's contact information into the fields.
   If the participant's physical address is different from the mailing address, select the state of the physical address. Once it is selected, the **County of Residence** will populate with a list of counties within that state. Select the county for the participant.
   Refer to the Data Collection Handbook for guidance on the participant address and county.

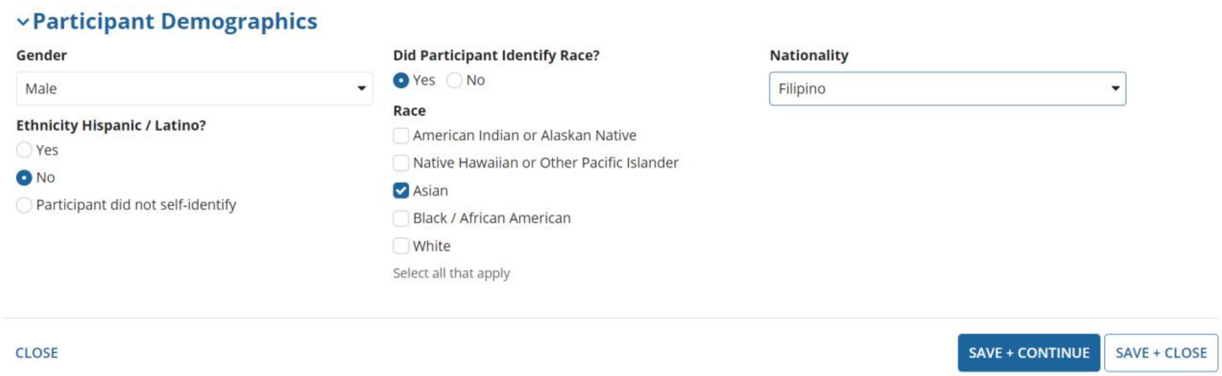


8. If the participant has a secondary contact, click the **Check if Available** checkbox under **Secondary Contact Information**.

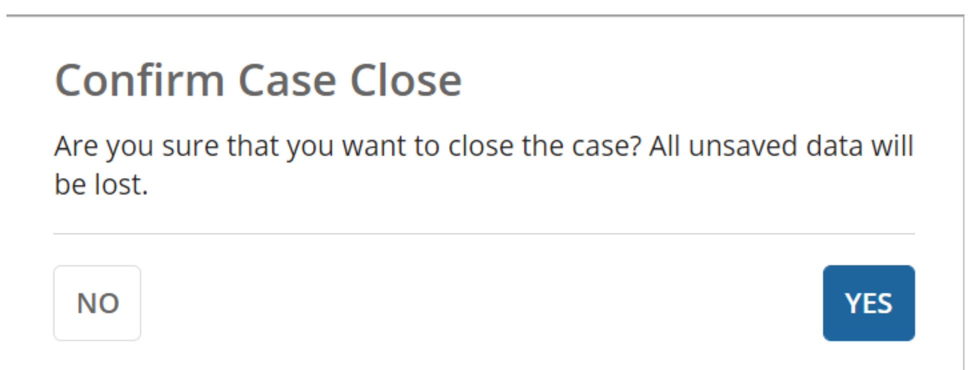
Once checked, the contact information fields are displayed on the screen. Enter the information into the fields.



9. Enter the participant's demographics. If **Native Hawaiian or Other Pacific Islander** or **Asian** is selected for **Race**, an additional dropdown labeled **Nationality** is displayed on the screen.

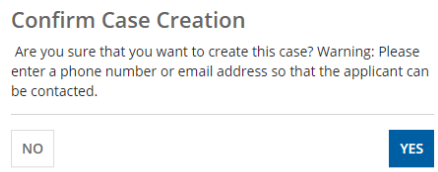


10. Click on one of the navigation buttons at the bottom of the screen:
    i. **CLOSE** opens a pop-up window to confirm the case will close
    ii. Click **NO** to return to the **Intake** screen.
    iii. Click **YES** to end the case creation and return to the ***SCSEP Cases*** screen. Note that information entered into the fields on the screen is not saved.

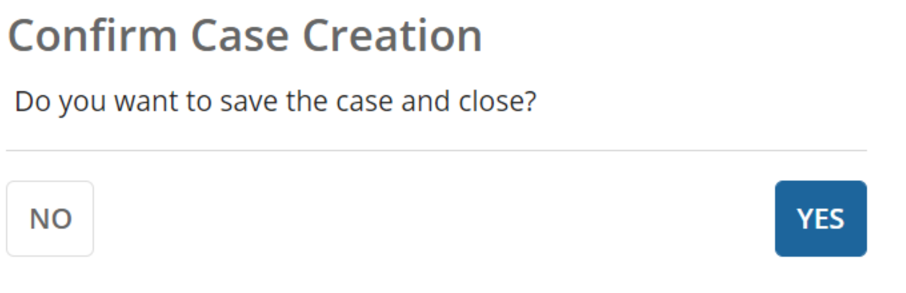


a. **SAVE + CONTINUE** opens a pop-up window to confirm case creation.
    i. Click **NO** to return to the **Intake** screen. Note that information entered into the fields on the screen is not yet saved.

ii. Click **YES** to save the information and create the case. The system navigates to the **Eligibility** screen.



b. **SAVE + CLOSE** saves the information entered on the screen. The user remains on the screen until another navigation button is clicked.



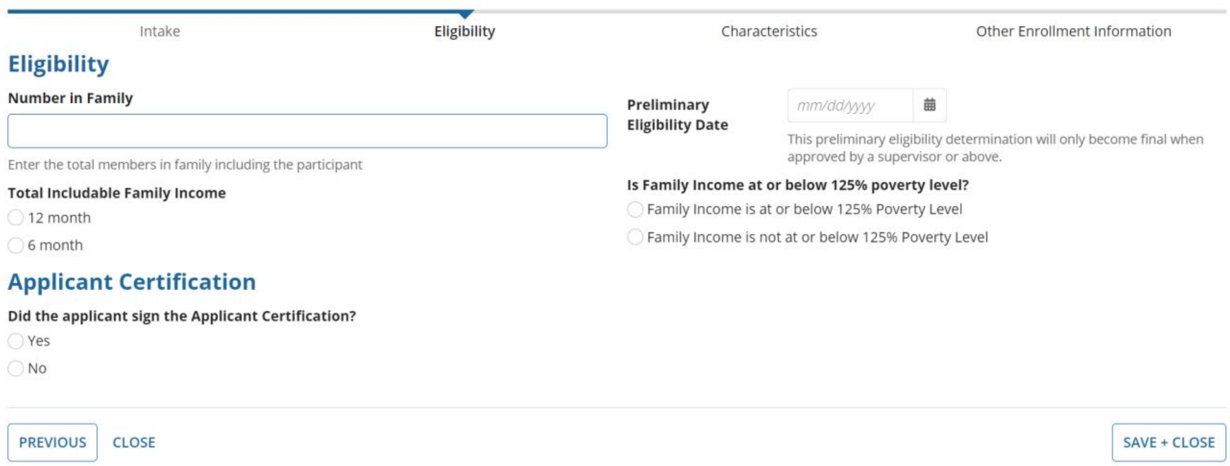
1.2 Eligibility

The next step in the case creation is the determination of the participant's eligibility to participate in the SCSEP program. The participant's eligibility requirements are entered into the system as an initial determination and then given final approval for participation.

Case managers who enter the initial determination requirements must get approval from their supervisors before enrolling the participant into a community service assignment. When the initial determination is entered into the system, the supervisor receives a notification to approve the participant as either eligible or ineligible. Once approval is given, the case manager receives a notification and can then enroll the participant in a community service assignment.

Supervisors, sub-grantee administrators, and grantee administrators may enter the initial determination and provide approval of the participant.

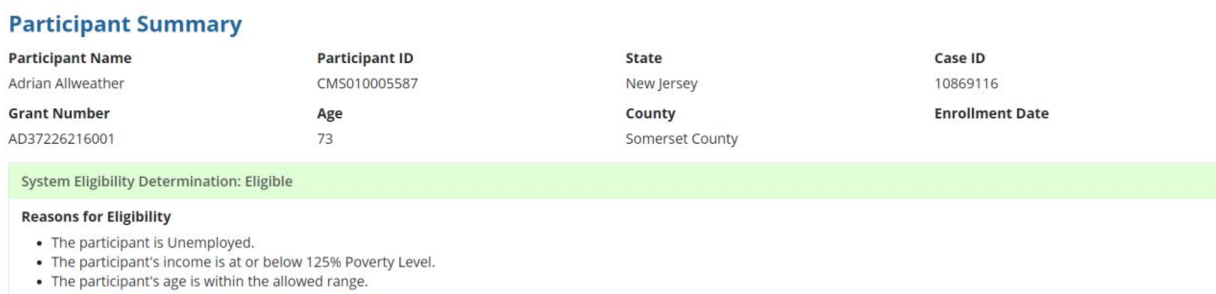
The following steps outline the eligibility approval process.



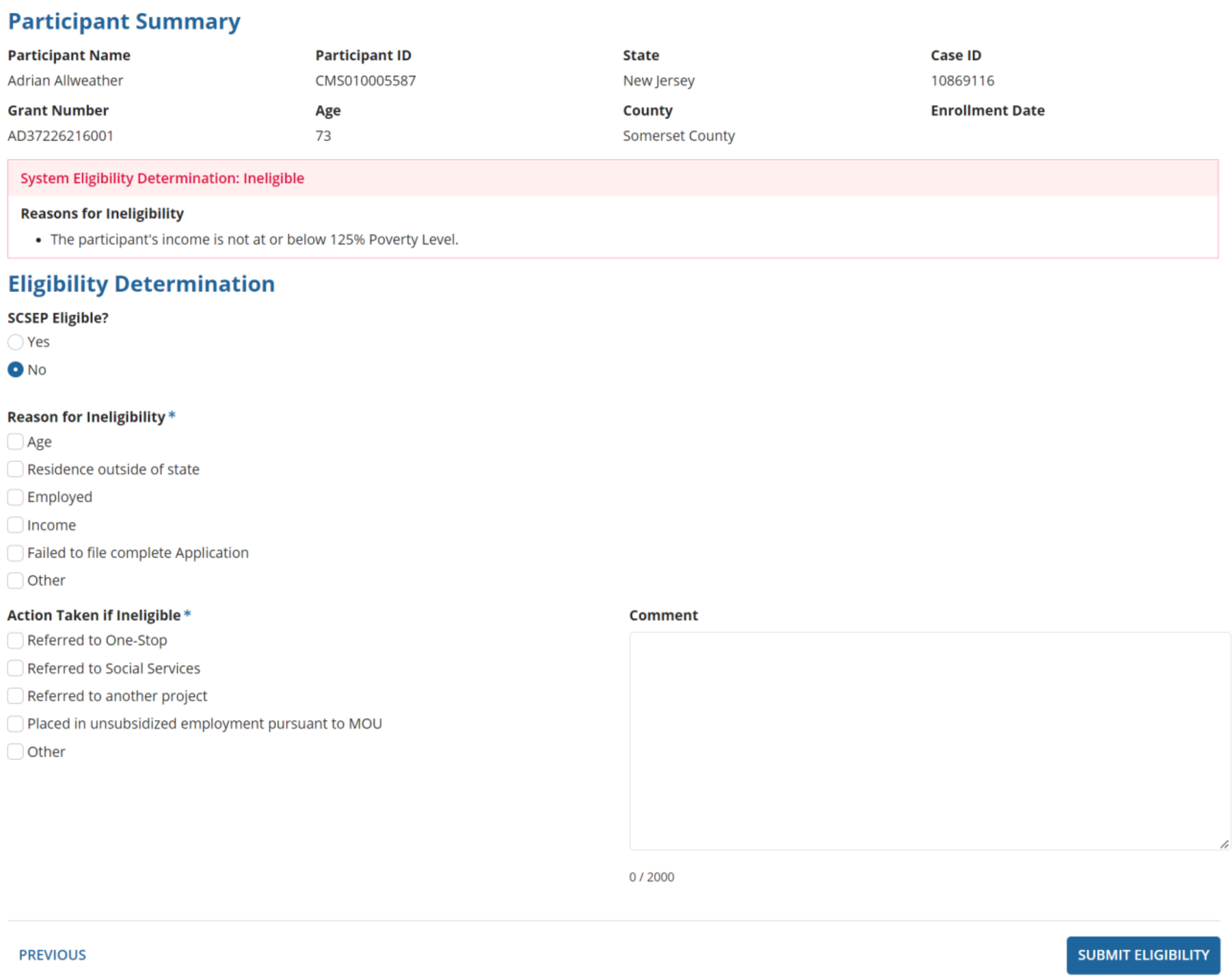
Case Manager:

1. Enter the information into the fields on the **Eligibility** screen.
2. Click on one of the navigation buttons at the bottom of the screen:
   a. **PREVIOUS –** Button will navigate the user back to the prior page in the intake process.
   b. **CLOSE** – Button will navigate the user back to the main cases page and no information will be saved. Confirmation message will appear prior to navigation.
   c. **SAVE + CONTINUE –** Button will save information entered on the page and navigate the user to the next page.
   d. **SAVE + CLOSE** – Button will save information entered on the page and navigate the user to the main cases page.

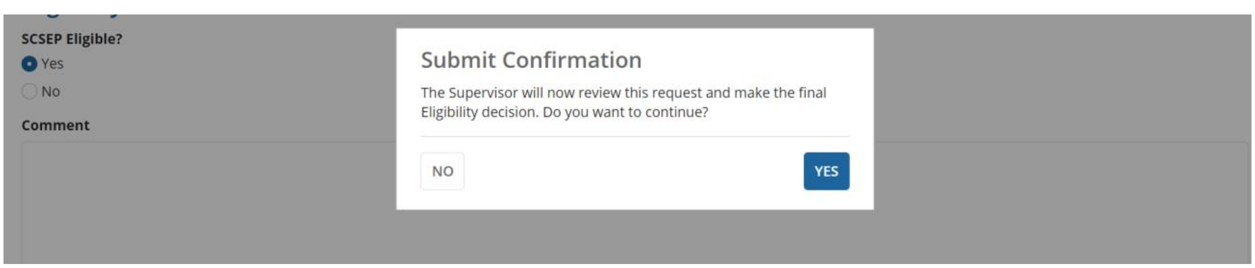
If **SAVE + CONTINUE** is clicked, the system will display eligibility based on the information entered.



3. Select whether the participant is eligible and enter the information into the fields on the screen. If **No** is selected for **SCSEP Eligible?** additional fields for ineligibility are displayed on the screen.



4. Click on one of the navigation buttons at the bottom of the screen:
   a. **PREVIOUS** returns the user to the previous screen.
   b. **SUBMIT** opens a pop-up window to confirm eligibility submission.
      i. Click **NO** to return to the current screen.
      ii. Click **YES** to submit the eligibility for supervisor approval.



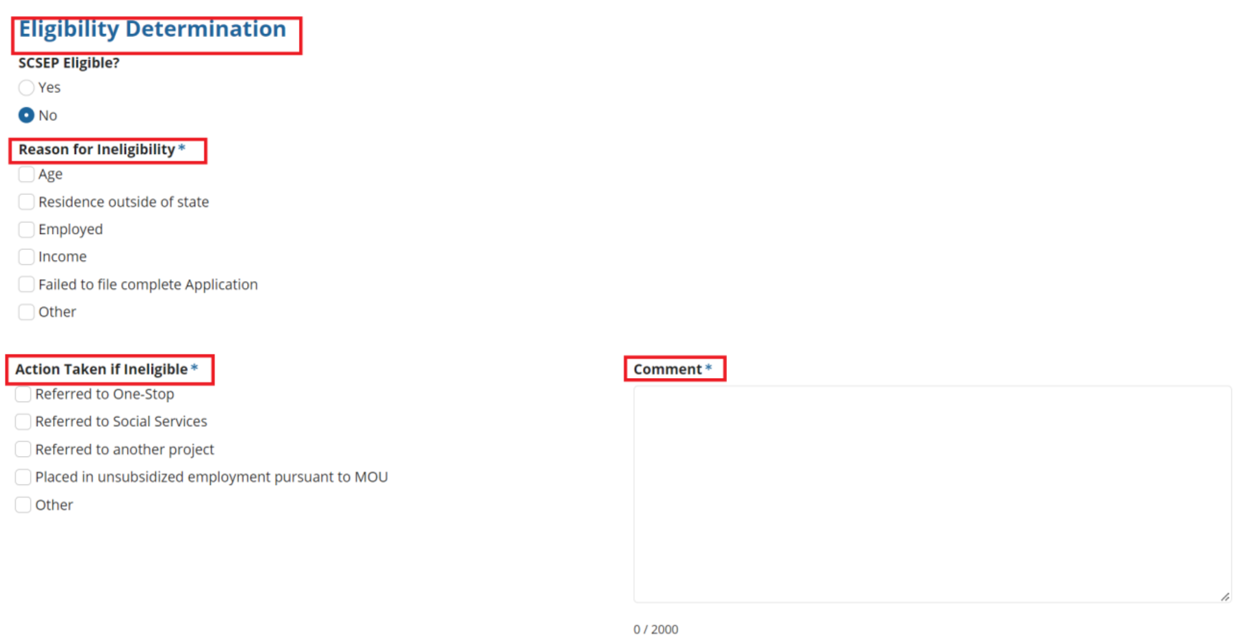
A notification is sent to the supervisor requesting approval for eligibility determination and the system navigates to the **Characteristics** screen.

While eligibility is pending approval, the case manager can continue entering information into the **Characteristics** and **Other Enrollment Information** case screens.

Supervisor:

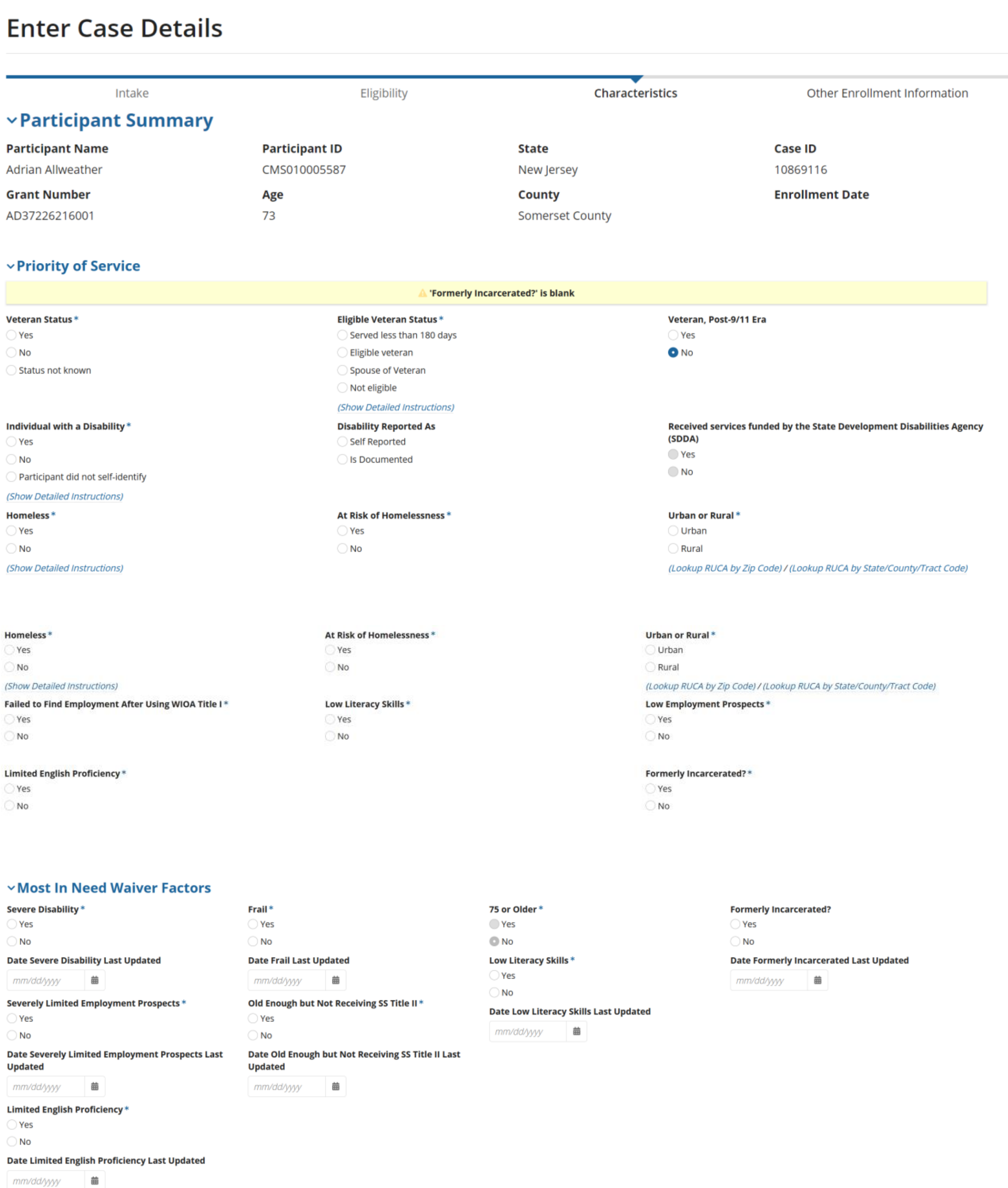
If a case manager submits a case for eligibility approval, the supervisor will receive a task immediately in their list.

1. Click on the *MY TASKS* tab to find the participant in the tasks list.
2. Click on the link in the task to approve the eligibility for the participant. The system navigates to the Intake Checklist screen.
3. Click the **APPROVE ELIGIBILITY** button in the top right corner of the screen. The system navigates to the Eligibility Determination Approval screen.
4. Select whether the participant is eligible and enter the information into the fields on the screen. If **No** is selected for **SCSEP Eligible?**, additional fields for ineligibility are displayed on the screen.
5. Click on one of the navigation buttons at the bottom of the screen:
    a. **CANCEL** – Button will navigate the user back to the Intake Checklist screen.
    b. **SUBMIT** –
        i. If the participant was deemed eligible, the button will navigate the user back to the Intake Checklist screen and the participant's status appears as Eligible.
        ii. If the participant was deemed ineligible, the button will navigate the user back to the Intake Checklist screen and the participant's status appears as Ineligible.



1.3 Characteristics

The next step in the case creation is the entry of the participant characteristics.



OFFICE OF THE CHIEF INFORMATION OFFICER

Other Characteristics

Public Assistance

Receiving Temporary Assistance for Needy Families (TANF) *
- Yes
- No

Supplemental Security Income (SSI) / Social Security Disability Insurance (SSDI) Status *
- SSI
- SSDI
- SSI and SSDI
- SSI and Ticket Holder
- SSDI and Ticket Holder
- Both SSI and SSDI and a Ticket Holder
- Does not meet above conditions

Receiving Supplemental Nutrition Assistance (SNAP) *
- Yes
- No

Subsidized Housing *
- Yes
- No

State or Local Welfare (General Assistance) *
- Yes
- No

Other Public Assistance Recipient *
- Yes
- No

Unemployment Compensation Eligibility Status *
- Claimant Referred by Reemployment Services and Eligibility Assessment (RESEA)
- Claimant Referred by Worker Profiling and Reemployment Services (WPRS)
- Claimant Not Referred by RESEA or WPRS
- Exhaustee
- Claimant is Exempt
- Neither Claimant nor Exhaustee

Educational Attainment

Highest Education Level Completed *

-- Select Highest School Grade Completed --

Other Barriers to Employment

Please answer the following questions pertaining to the participant at program entry

Ex-Offender *
- Yes
- No
- Participant did not disclose

(Show Detailed Instructions)

Greatest Social Need *
- Yes
- No

(Show Detailed Instructions)

Other Significant Barrier to Employment *
- Yes
- No

Low Income Status at Program Entry *
- Yes
- No

(Show Detailed Instructions)

Displaced Homemaker *
- Yes
- No

(Show Detailed Instructions)

Participant Characteristics Comments

0 / 2000

PREVIOUS CLOSE SAVE + CONTINUE SAVE + CLOSE

Veteran Status

Veteran Status
- Yes
- No
- Status not known

Eligible Veteran Status
- Served less than 180 days
- Eligible veteran
- Spouse of Veteran
- Not eligible

(Show Detailed Instructions)

Veteran, Post-9/11 Era *
- Yes
- No

Individual with a Disability

Individual with a Disability
- Yes
- No
- Participant did not self-identify

(Show Detailed Instructions)

Disability Reported As *
- Self Reported
- Is Documented

Received services funded by the State Development Disabilities Agency (SDDA)
- Yes
- No

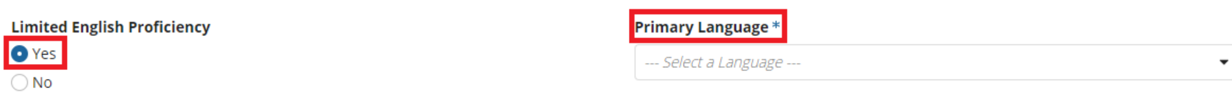
If a user selects **Participant did not self-identify** under **Individual with a Disability,** the **Has the individual received services funded by the State Development Disabilities Agency (SDDA)? question** is grayed out and not editable.

Homeless

When a user selects **Yes** for **Homeless**, the **At Risk of Homelessness** field automatically selects **No** and is grayed out.

Limited English Proficiency

When a user selects **Yes** for **Limited English Proficiency**, the field **Primary Language** appears and is mandatory.

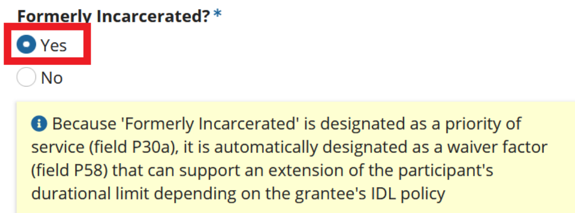


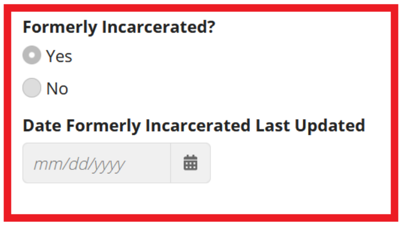
Formerly Incarcerated

When a user selects **Yes** for **Formerly Incarcerated?** under **Priority of Service**, the following text displays below the field in a yellow text box:

> Because 'Formerly Incarcerated' is designated as a priority of service (field P30a), it is automatically designated as a waiver factor (field P58) that can support an extension of the participant's durational limit depending on the grantee's IDL policy.

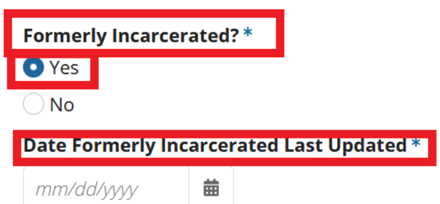
Additionally, the **Formerly Incarcerated?** field under **Most in Need Waiver Factors** automatically selects **Yes** and is grayed out, along with **Date Formerly Incarcerated Last Updated**.

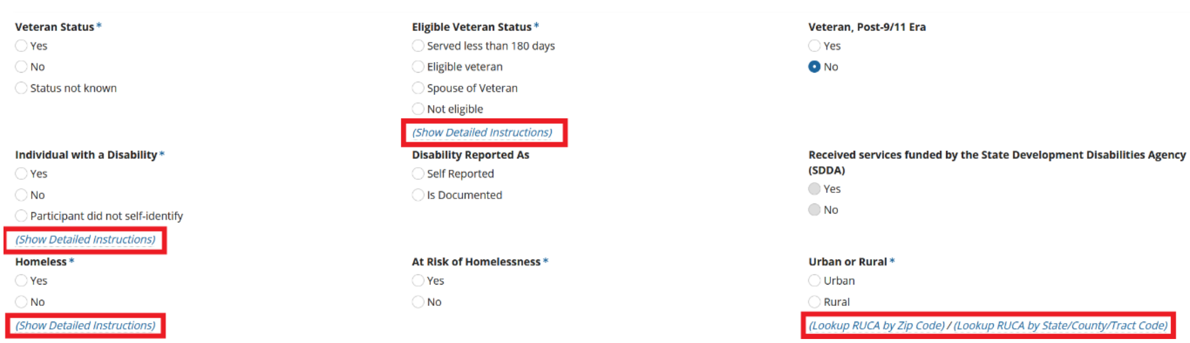

Formerly Incarcerated? *
Yes
No
Because 'Formerly Incarcerated' is designated as a priority of service (field P30a), it is automatically designated as a waiver factor (field P58) that can support an extension of the participant's durational limit depending on the grantee's IDL policy


Formerly Incarcerated?
Yes
No
Date Formerly Incarcerated Last Updated
mm/dd/yyyy

When a user selects **No** for **Formerly Incarcerated?** under **Priority of Service**, the **Formerly Incarcerated?** field under **Most in Need Waiver Factors** becomes required. When the user selects **Yes** for that field, **Date Formerly Incarcerated Last Updated** becomes required as well.


Formerly Incarcerated? *
Yes
No


Formerly Incarcerated? *
Yes
No
Date Formerly Incarcerated Last Updated *
mm/dd/yyyy


Veteran Status *
Yes
No
Status not known

Eligible Veteran Status *
Served less than 180 days
Eligible veteran
Spouse of Veteran
Not eligible
(Show Detailed Instructions)

Veteran, Post-9/11 Era
Yes
No

Individual with a Disability *
Yes
No
Participant did not self-identify
(Show Detailed Instructions)

Disability Reported As
Self Reported
Is Documented

Received services funded by the State Development Disabilities Agency (SDDA)
Yes
No

Homeless *
Yes
No
(Show Detailed Instructions)

At Risk of Homelessness *
Yes
No

Urban or Rural *
Urban
Rural
(Lookup RUCA by Zip Code) / (Lookup RUCA by State/County/Tract Code)

Most In Need Waiver Factors

Severe Disability *
Yes
No

Date Severe Disability Last Updated
mm/dd/yyyy

Severely Limited Employment Prospects *
Yes
No

Date Severely Limited Employment Prospects Last Updated
mm/dd/yyyy

Limited English Proficiency *
Yes
No

Date Limited English Proficiency Last Updated
mm/dd/yyyy

Frail *
Yes
No

Date Frail Last Updated
mm/dd/yyyy

Old Enough but Not Receiving SS Title II *
Yes
No

Date Old Enough but Not Receiving SS Title II Last Updated
mm/dd/yyyy

75 or Older *
Yes
No

Low Literacy Skills *
Yes
No

Date Low Literacy Skills Last Updated
mm/dd/yyyy

Formerly Incarcerated?
Yes
No

Date Formerly Incarcerated Last Updated
mm/dd/yyyy

The field **75 and Older** is auto populated based on date of birth and date of eligibility determination and is not editable on this screen.

Other Characteristics

Public Assistance

Receiving Temporary Assistance for Needy Families (TANF) *
Yes
No

Supplemental Security Income (SSI) / Social Security Disability Insurance (SSDI) Status *
SSI
SSDI
SSI and SSDI
SSI and Ticket Holder
SSDI and Ticket Holder
Both SSI and SSDI and a Ticket Holder
Does not meet above conditions

Receiving Supplemental Nutrition Assistance (SNAP) *
Yes
No

Subsidized Housing *
Yes
No

State or Local Welfare (General Assistance) *
Yes
No

Other Public Assistance Recipient *
Yes
No

Unemployment Compensation Eligibility Status *
Claimant Referred by Reemployment Services and Eligibility Assessment (RESEA)
Claimant Referred by Worker Profiling and Reemployment Services (WPRS)
Claimant Not Referred by RESEA or WPRS
Exhaustee
Claimant is Exempt
Neither Claimant nor Exhaustee

Educational Attainment

Highest Education Level Completed *
-- Select Highest School Grade Completed --

Other Barriers to Employment

Please answer the following questions pertaining to the participant at program entry

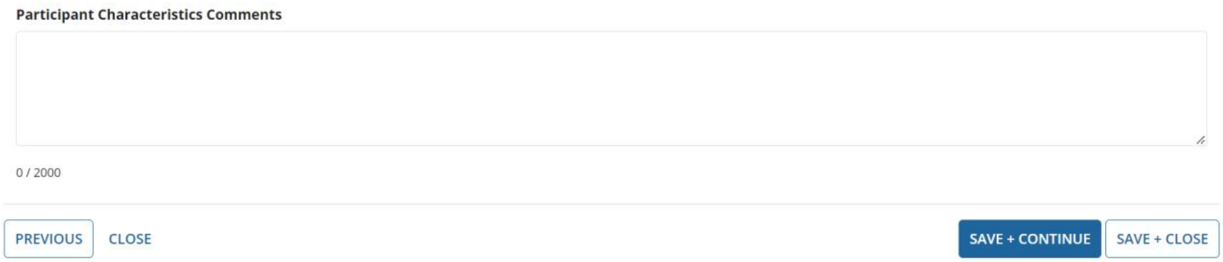
Ex-Offender *
Yes
No
Participant did not disclose
(Show Detailed Instructions)

Low Income Status at Program Entry *
Yes
No
(Show Detailed Instructions)

Greatest Social Need *
Yes
No
(Show Detailed Instructions)

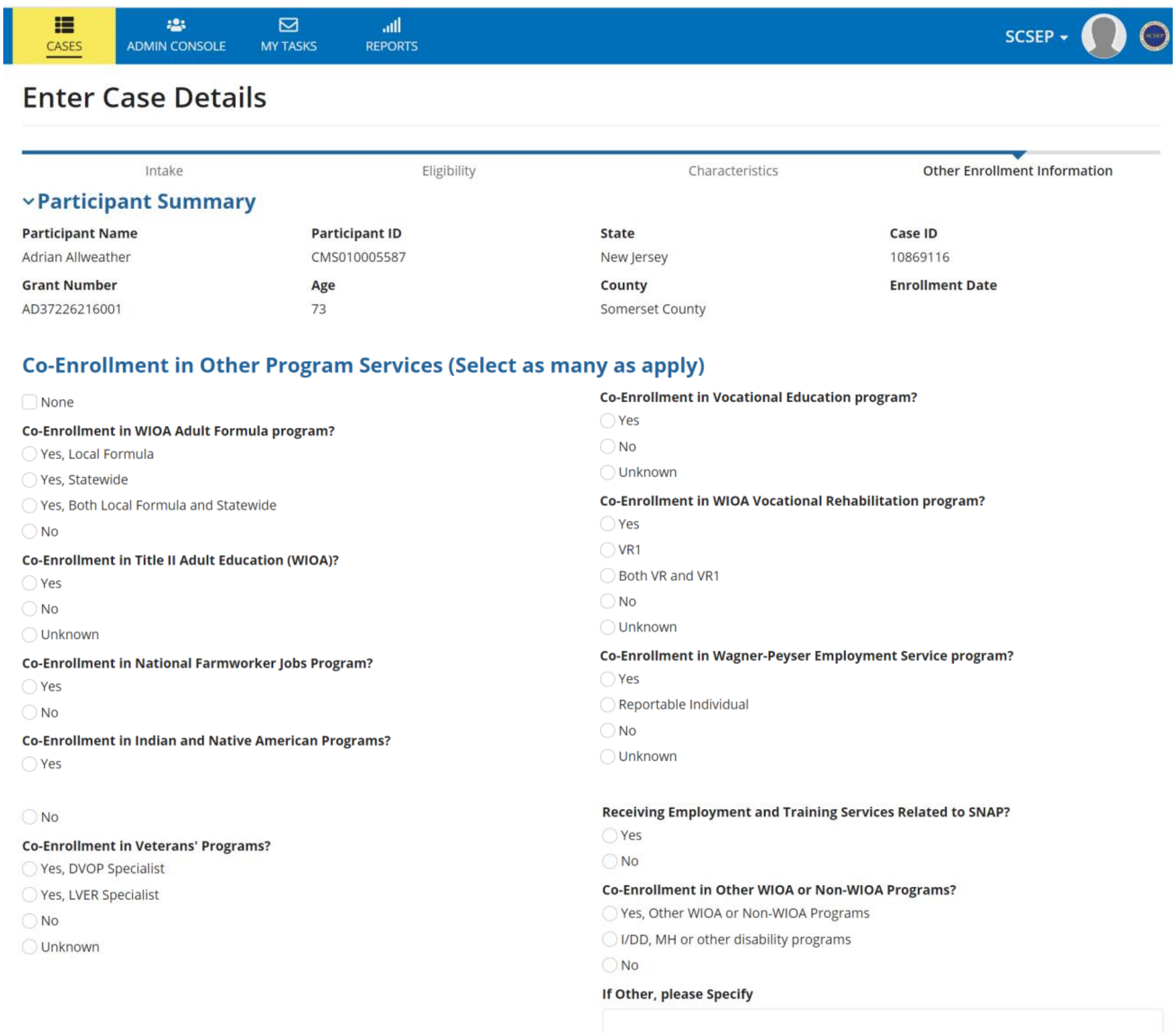
Displaced Homemaker *
Yes
No
(Show Detailed Instructions)

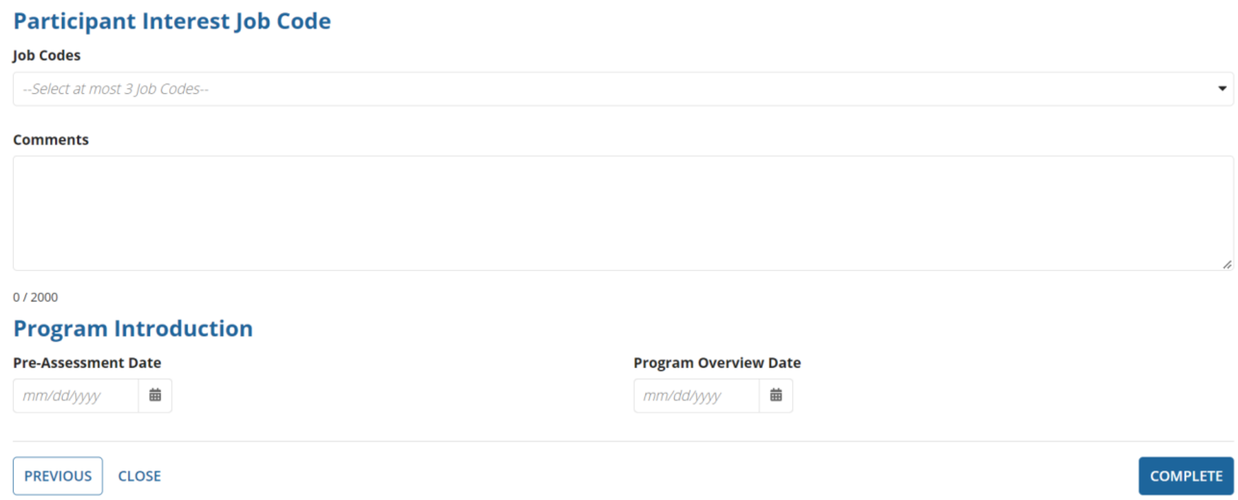
Other Significant Barrier to Employment *
Yes
No



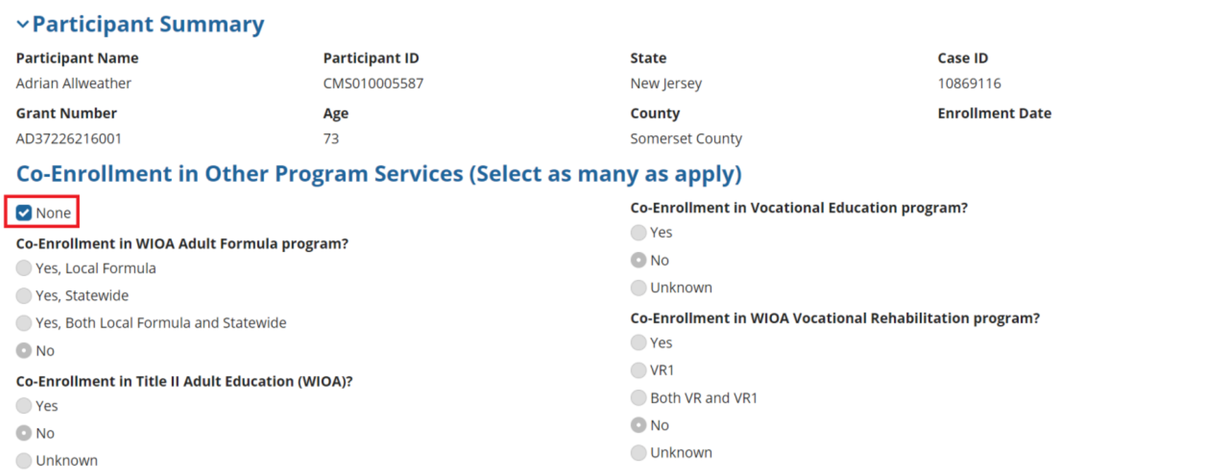
1.4 Other Enrollment Information

The following page is to identify any associated **Co-Enrollments in Other Program Services.**





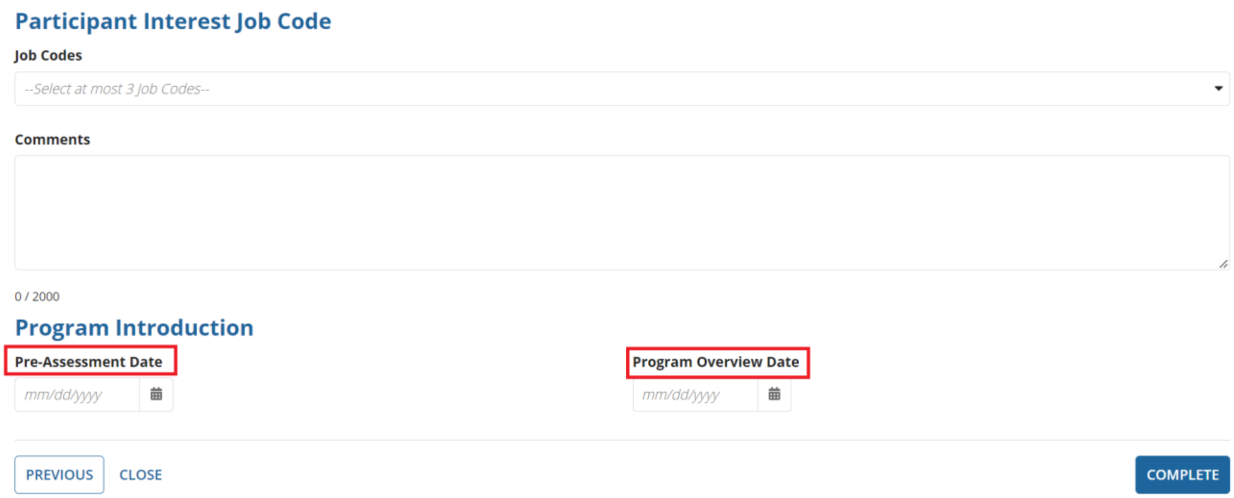
Selecting the **None** option deactivates all other fields in this section and auto populates them as **No**.



The **Participant Interest Job Code** dropdown allows the user to select up to three areas of interest.

Note: Both the **Pre-Assessment Date** and the **Program Overview Date** must

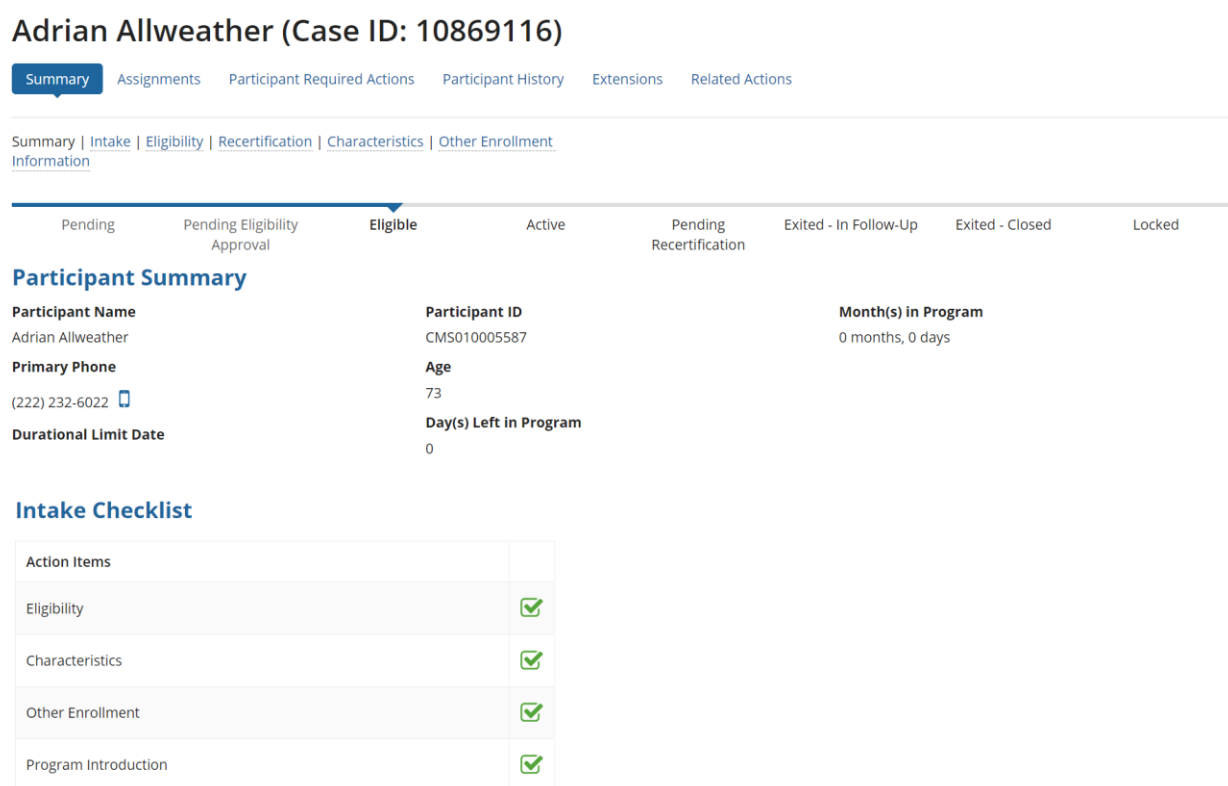
- occur after the **Application Date** and
- not occur in the future based on the date of data entry.



1.5 Intake Checklist

A user can track the status of the case intake process using the intake checklist, displayed below.

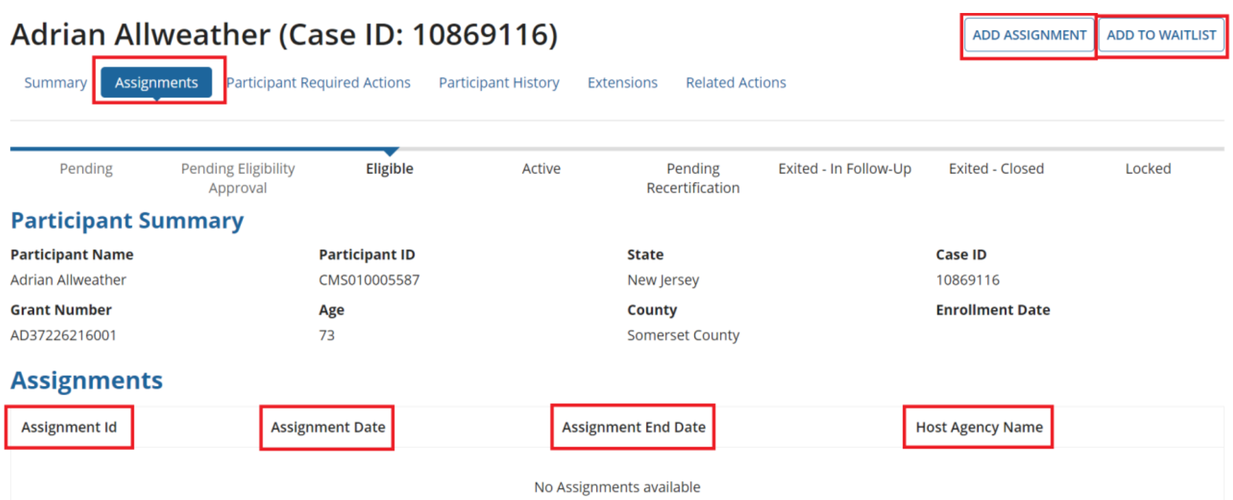
When an element of the intake process is complete, a green check will appear in this checklist. When all required elements have not been completed, the section text appears as a hyperlink that navigates the user to the selected section and the checkbox is empty.



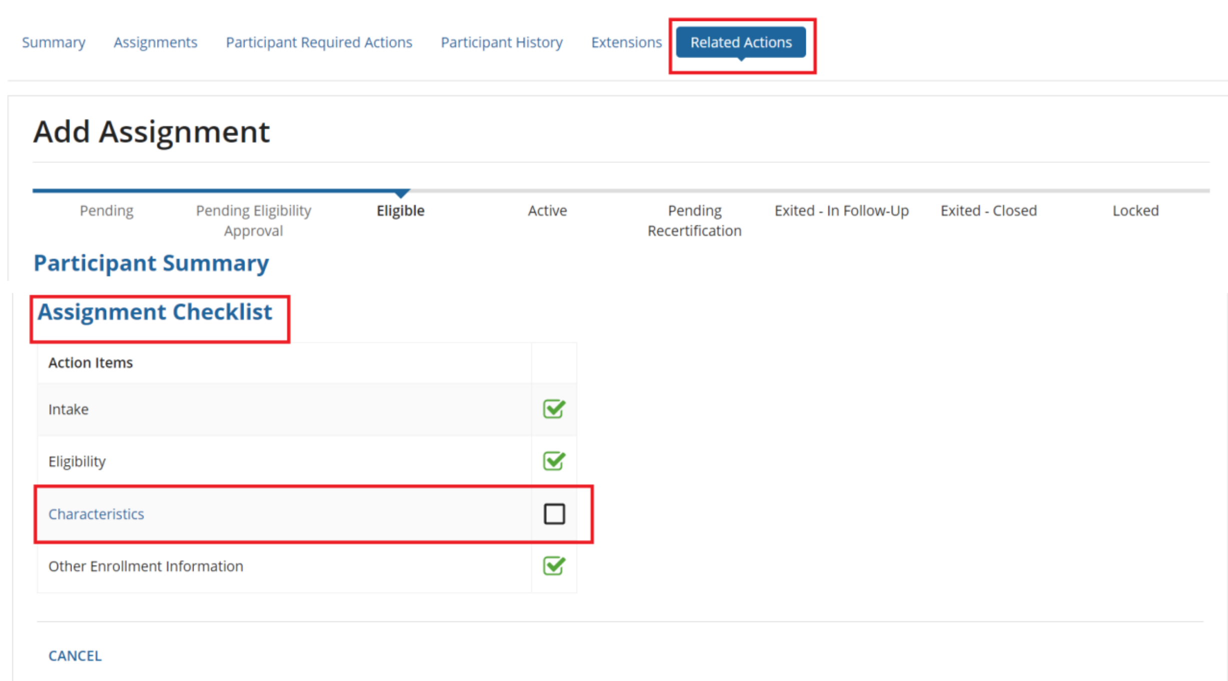
2. Add Assignment

Upon approval of Eligibility of the Participant by the Supervisor, the status changes to Eligible. Now the Assignments can be added to the Participants.

The **Assignments** tab provides a listing of all assignments for the Participant with an **Assignment ID**, **Assignment Date**, **Assignment End Date**, and **Host Agency Name**. The User can select from **ADD ASSIGNMENT** and **ADD TO WAITLIST.**



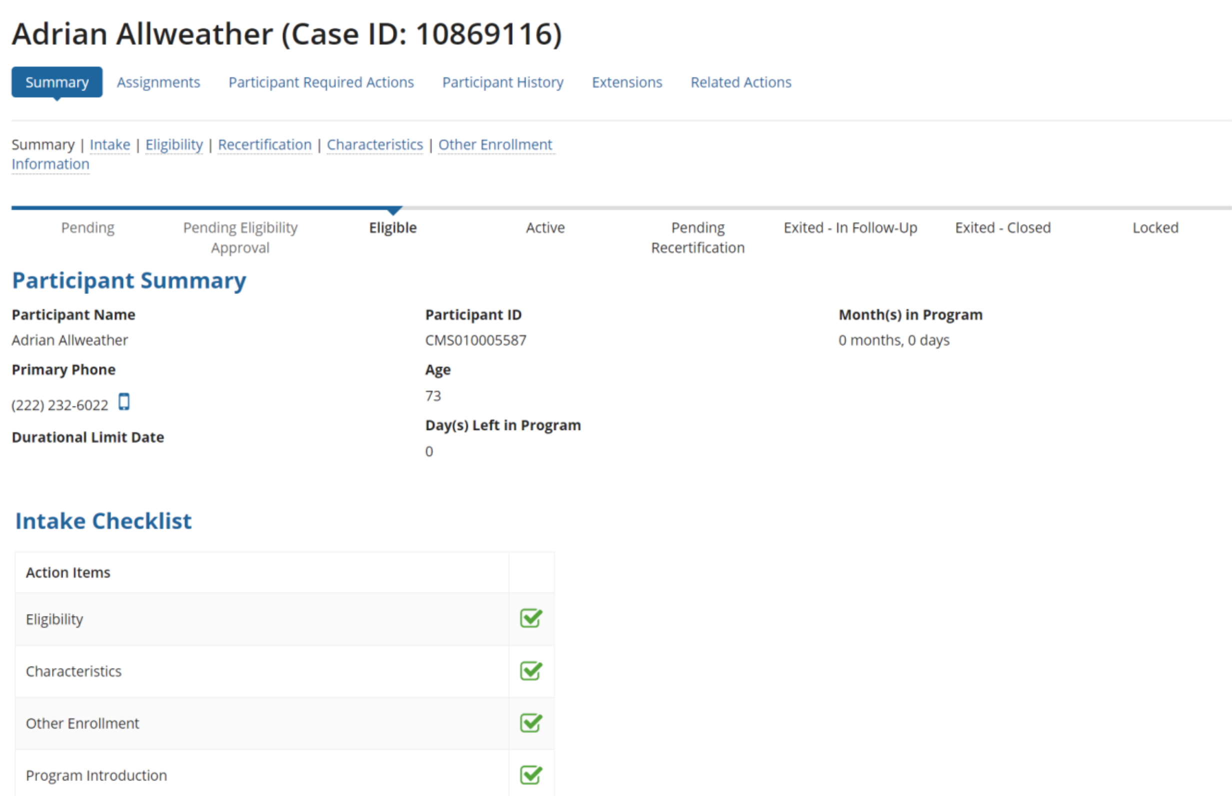
When **ADD ASSIGNMENT** is selected and not all elements of the intake process are completed, the user is taken to the **Assignment Checklist** screen to confirm the completion status of action items in the Assignment Checklist (Intake, Eligibility, Characteristics, Other Enrollment information).



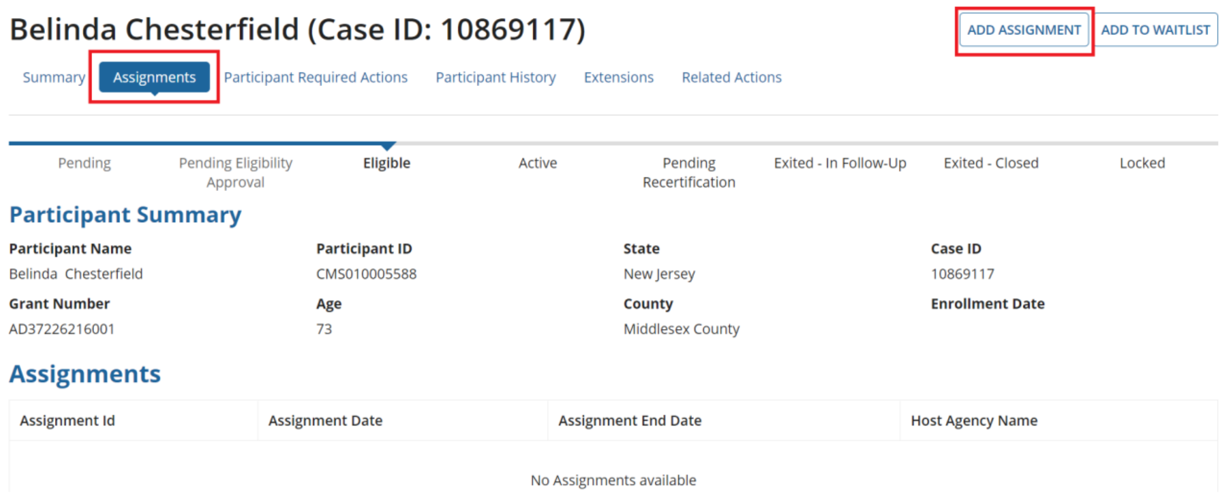
For action items not checked (not completed), clicking the unchecked action item in the Assignment Checklist (Characteristics in this example) will take the user to that relevant page. Some of the fields that were not mandatory during Enrollment are mandatory for adding **Assignments.**

After completing all the mandatory (*) fields in all the relevant pages, clicking **SAVE + CLOSE** will save the data entered.

Once the pending action items are completed, all action items in the **Intake Checklist** are checked. The user can then add Assignments to the participant record.



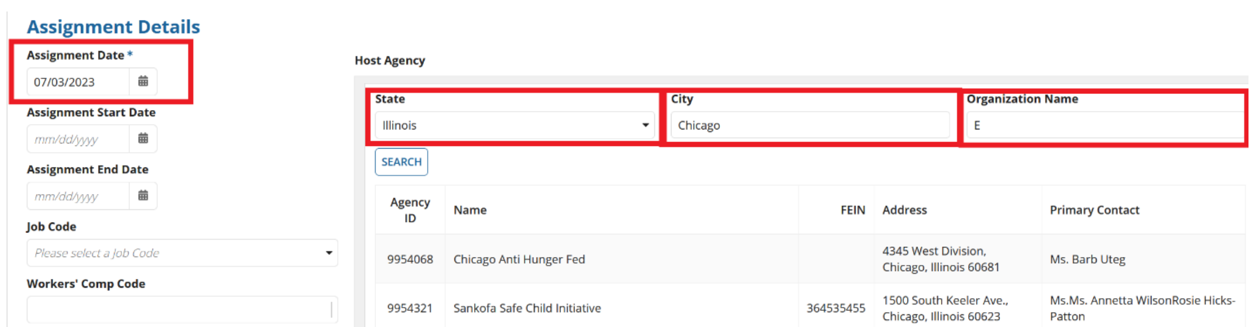
To add assignments, click the **ADD ASSIGNMENT** button.



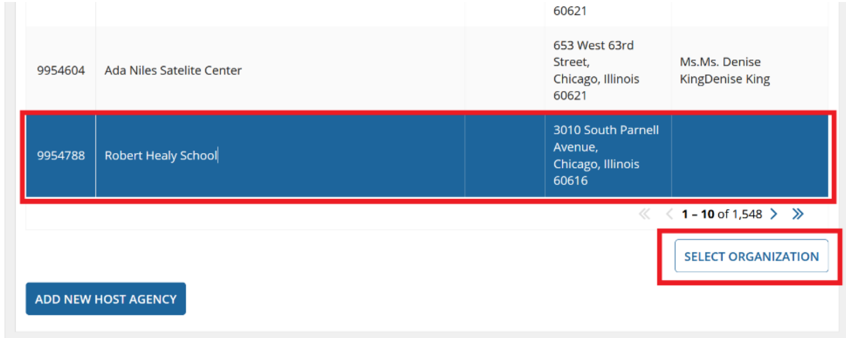
Next enter **Assignment Date** (the date should not be before **Eligibility Determination Date**), choose **State** from the dropdown, enter **City**, enter **Organization Name**, and click **Search**.

Once **Search** is clicked, the following fields are displayed below the **Search** button.

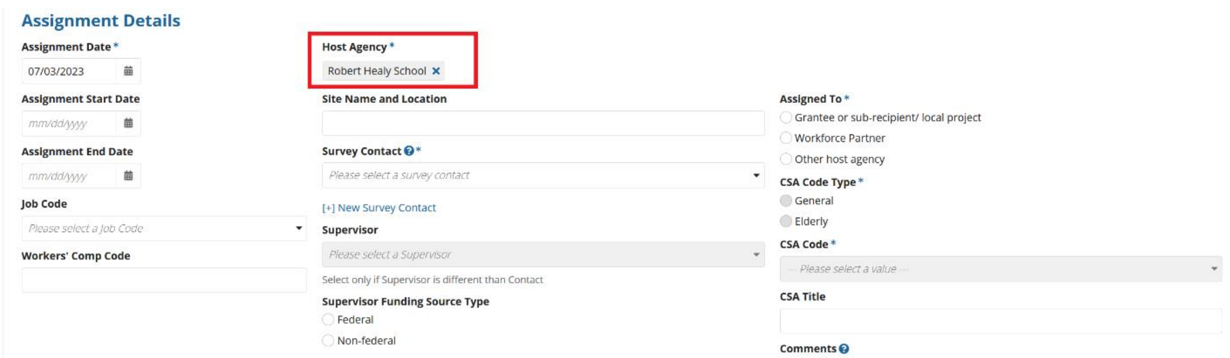
1. Agency ID
2. Name
3. Address
4. Primary Contact



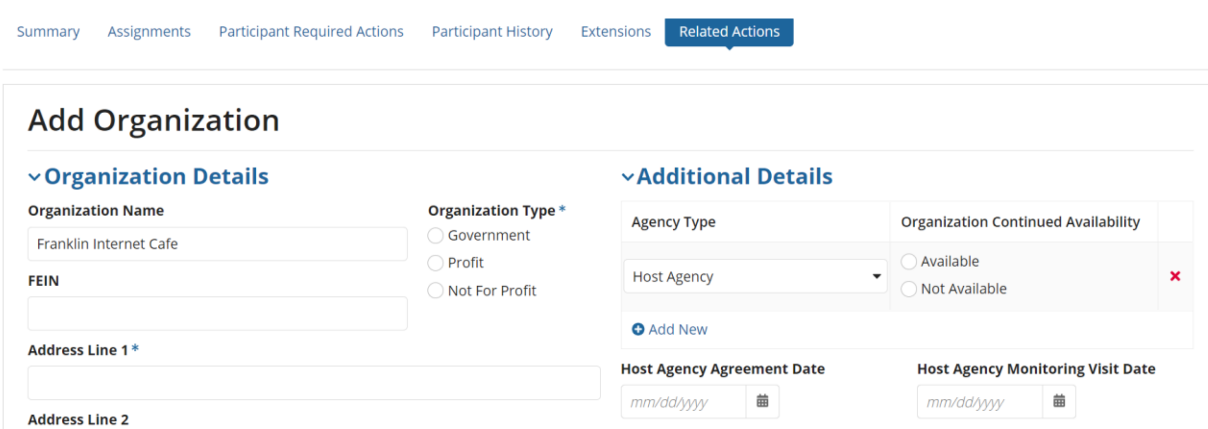
Select agency from search result or click **ADD NEW HOST AGENCY.** If the agency is selected from the search results, **SELECT ORGANIZATION** button is displayed.

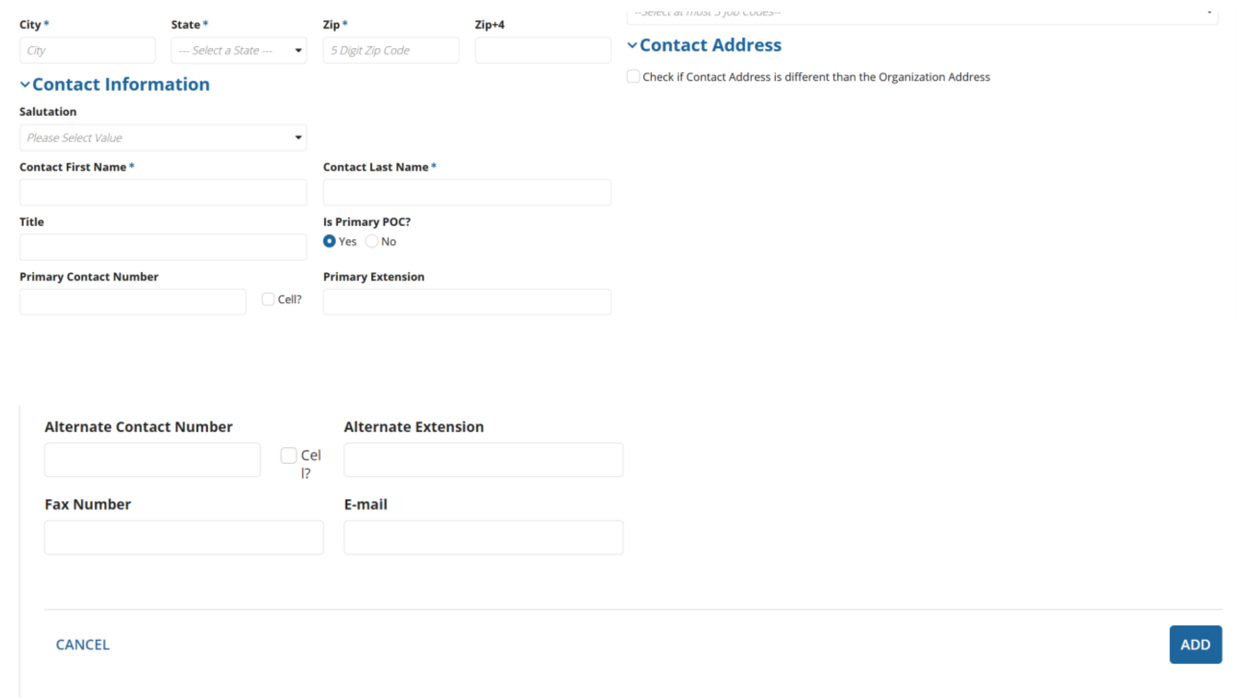


When **SELECT ORGANIZATION** button is clicked, the selected organization gets added to **HOST AGENCY** field.

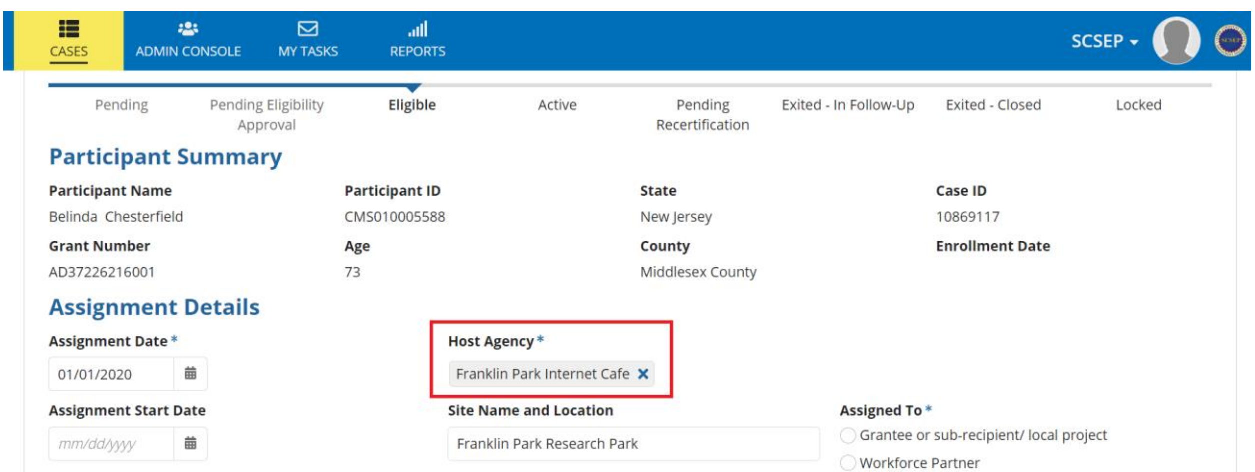


If the **ADD NEW HOST AGENCY** button is clicked, the user will go to the **Add Organization** page.

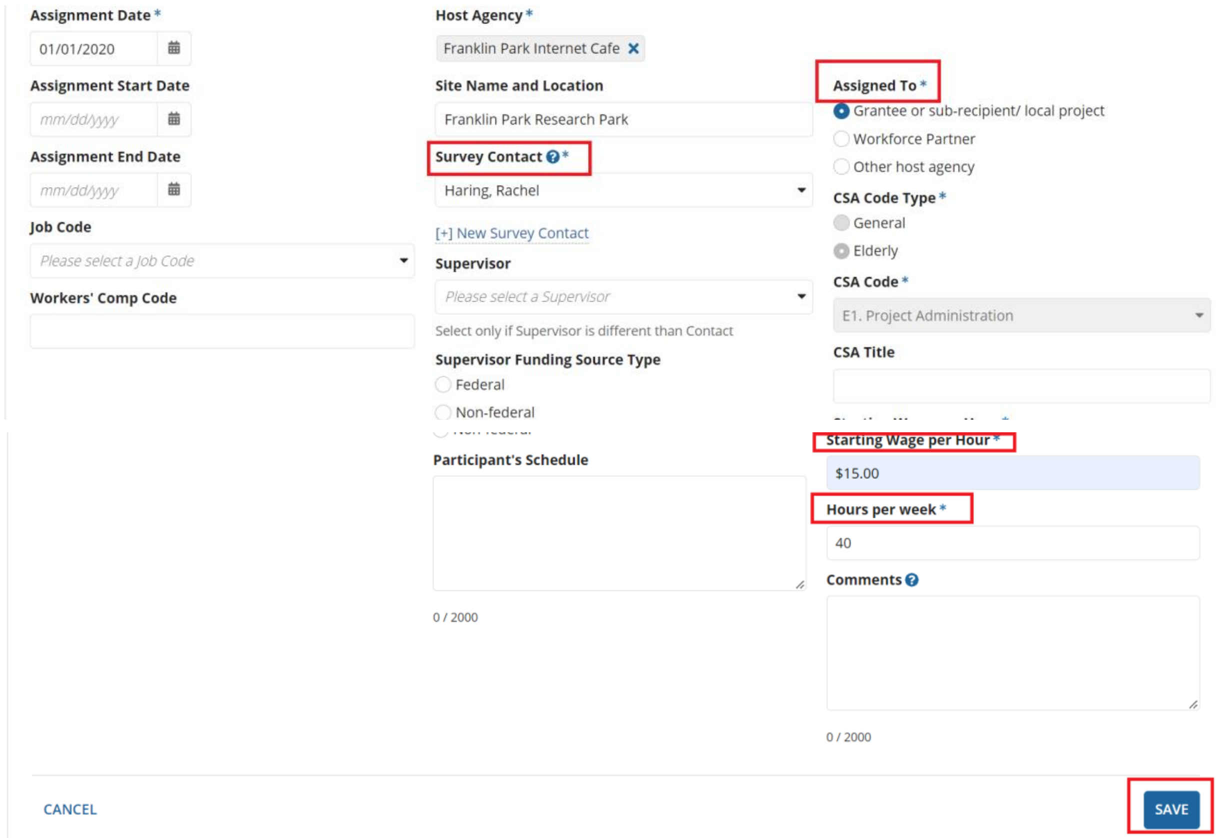




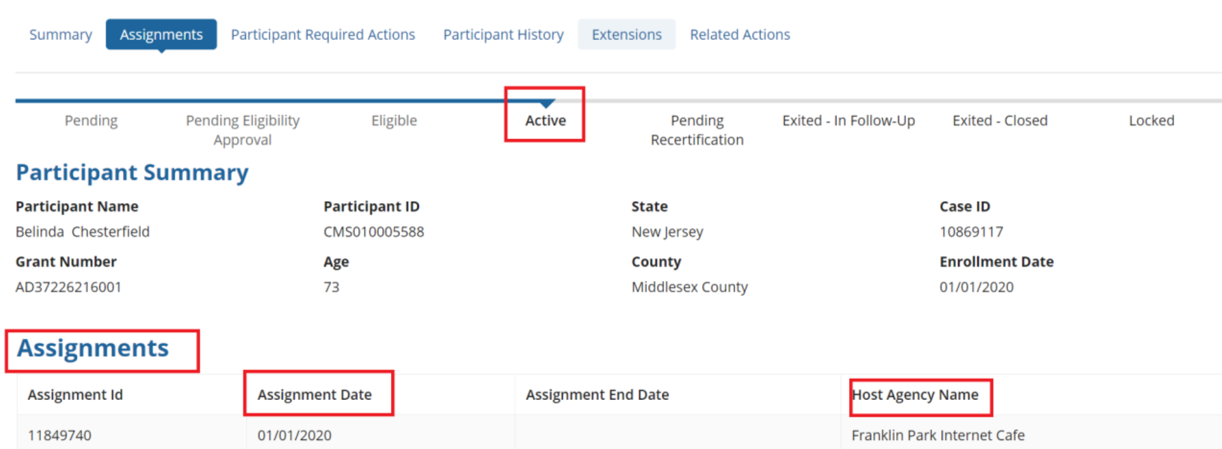
By clicking the **Add** button, the newly entered host agency gets added to **Host Agency** field in the **Add Assignment** page, as shown below.



Fill in all the mandatory fields and click the **Save** button.

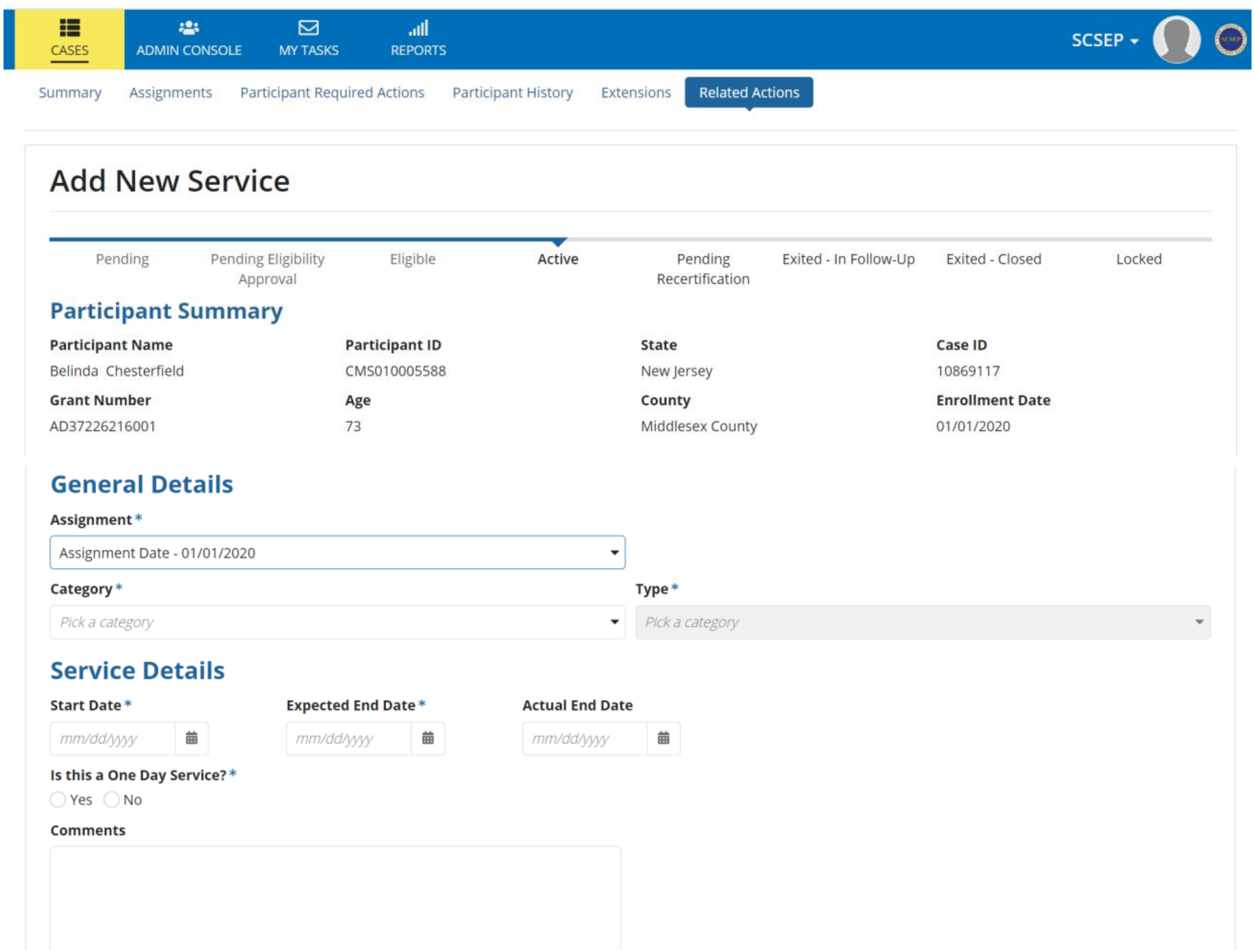


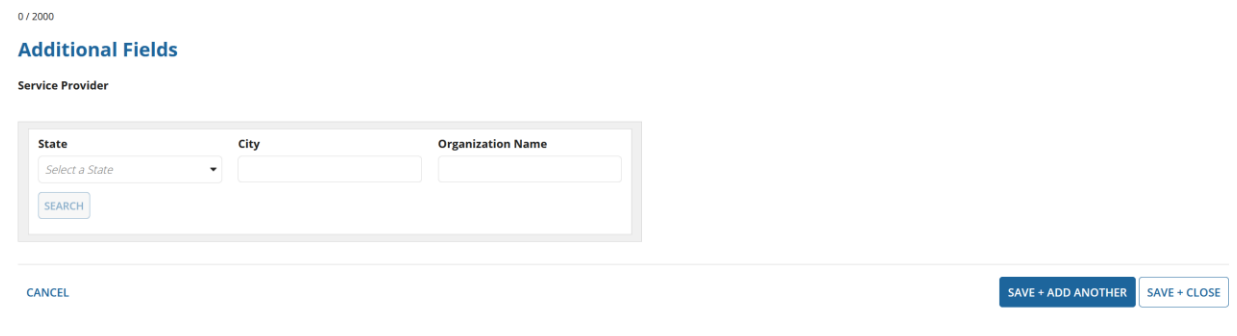
The **Status** of the Participant changes to **Active**.



3. Add Service

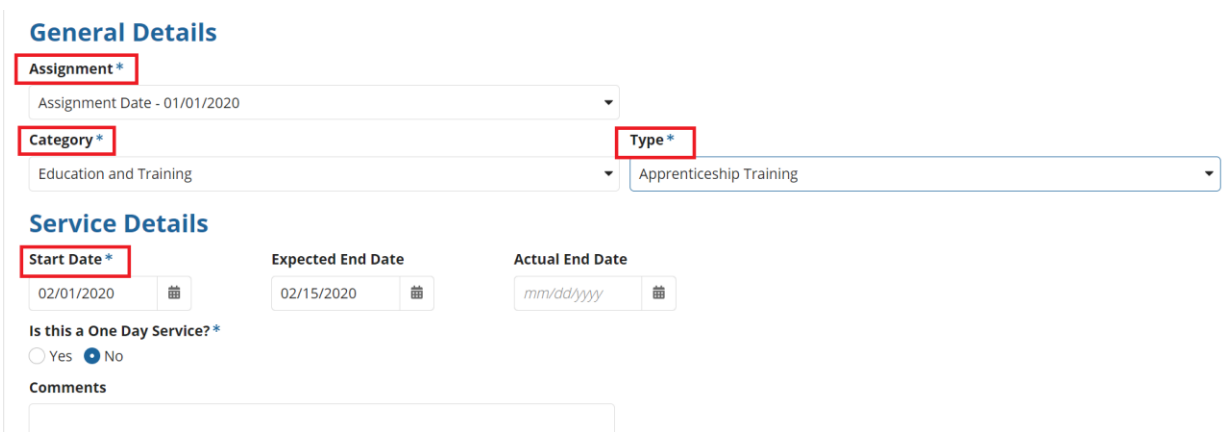
Once the participant enrolls in the program, the participant can avail any of the services listed in **Service Details** to get trained for employment.





Choose the following in which the Participant wants to get trained, and enter the **Start Date**:

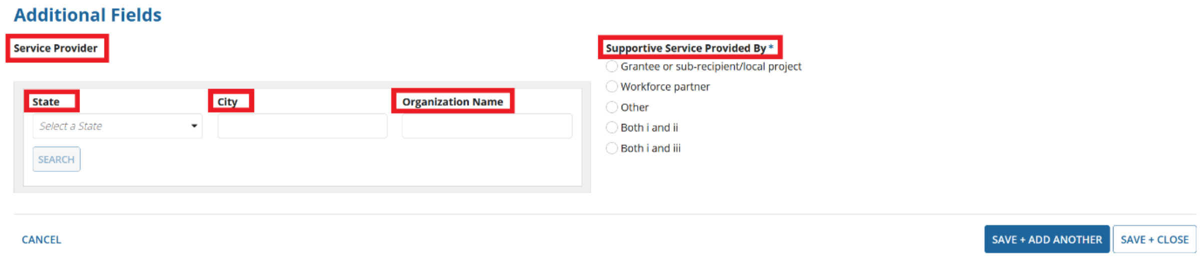
a. **Category**
b. **Type**



The bottom section of this page has Additional Fields. To display a list of **Service Providers**, enter the following, and click **Search**.

a. **State**
b. **City**
c. **Organization Name**

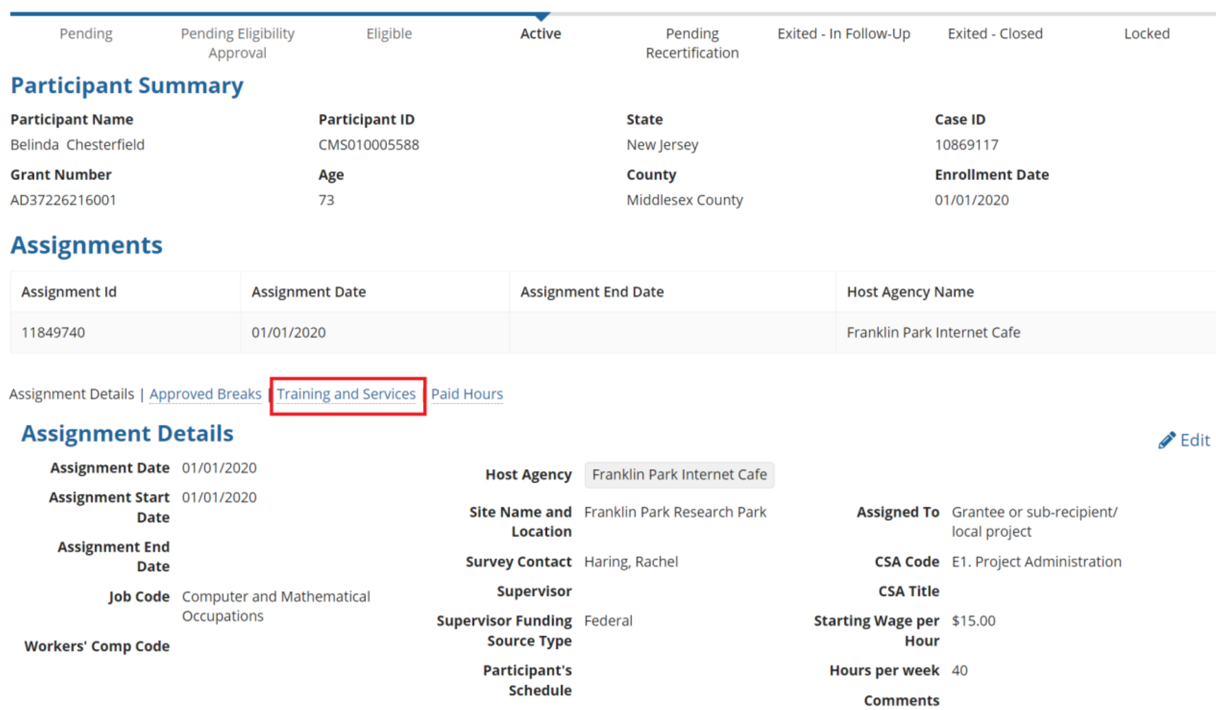
From the displayed result list, select an agency and click the **SELECT ORGANIZATION** button. The selected agency is displayed in the **Service Provider** field below.



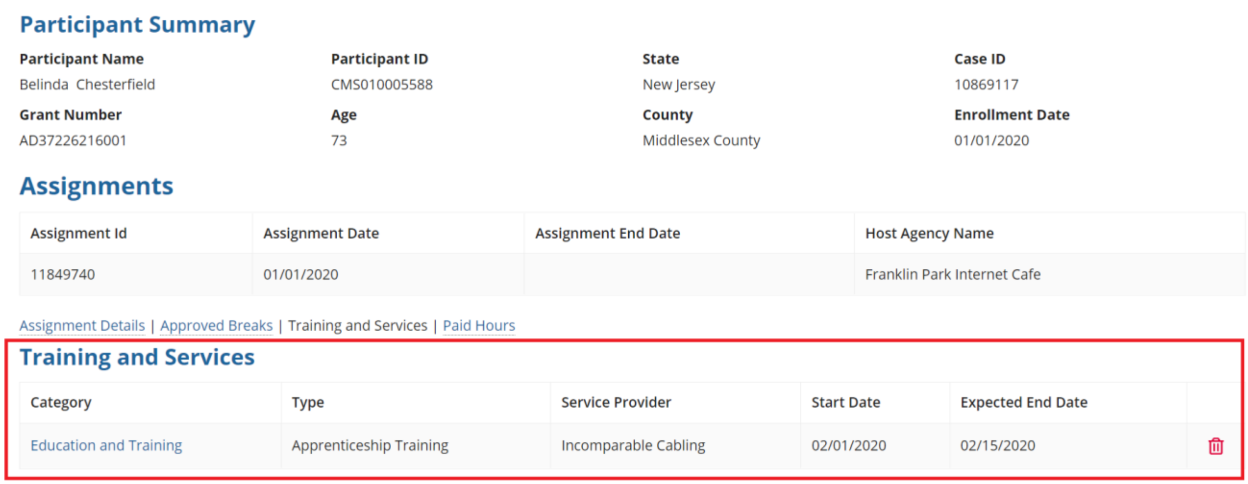
To add another service, click **SAVE + ADD ANOTHER** button.

To save the current service without adding another, click the **SAVE + CLOSE** button.

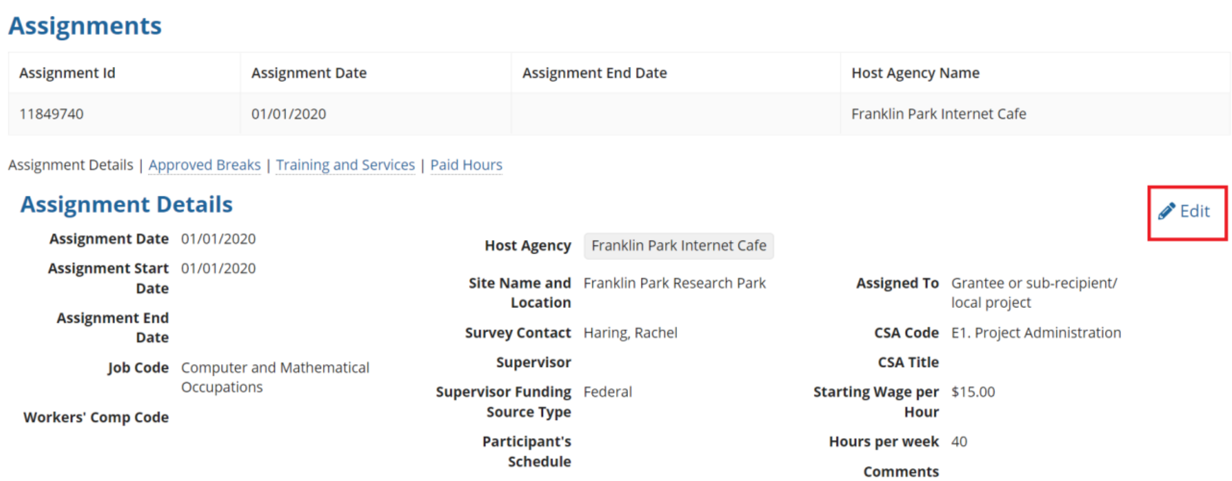
Added **Services** is updated in the **Training and Services**, as shown below.



When **Training and Services** is clicked, the updated details are displayed.

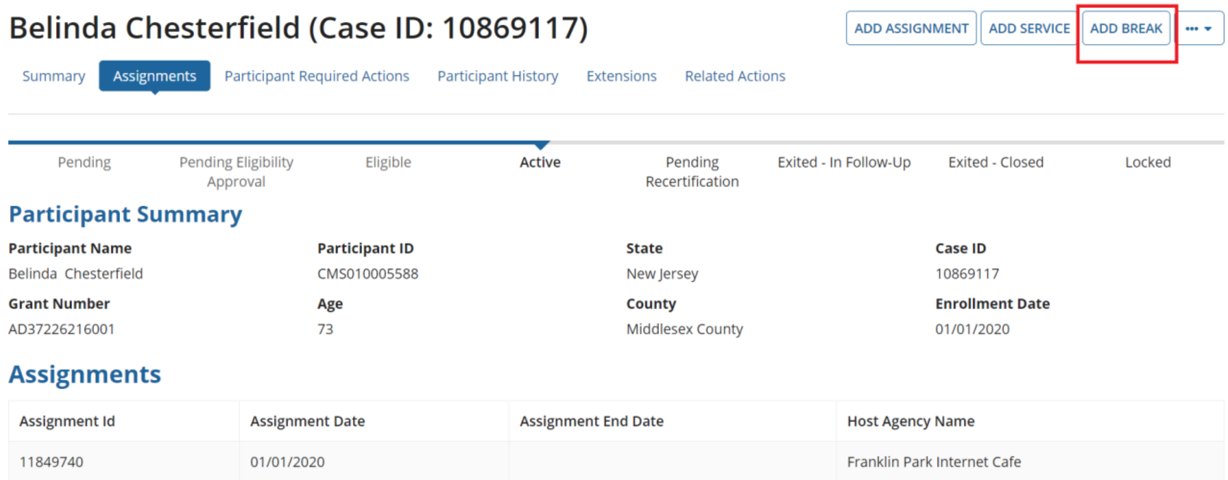


To edit the information displayed, click the **Edit** button.

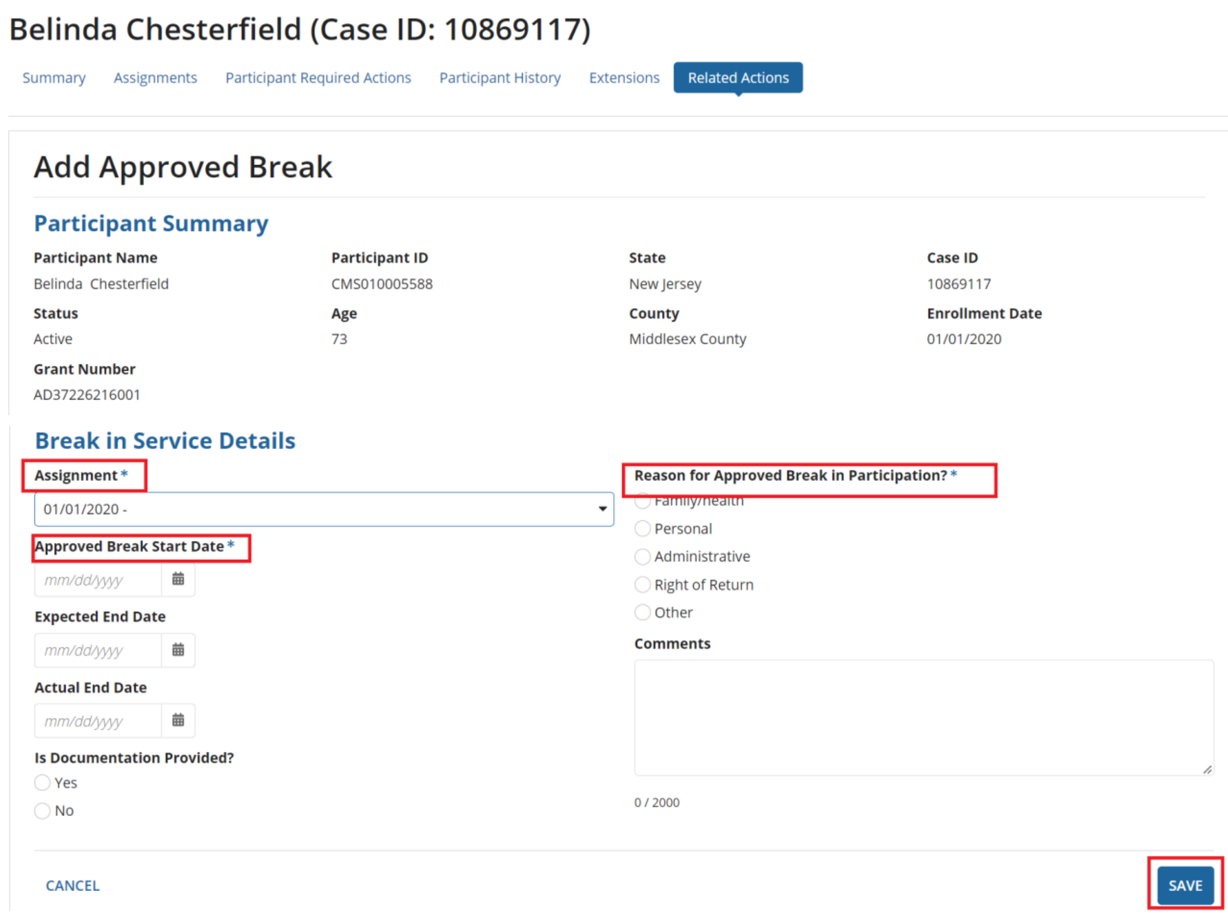


4. Add Break

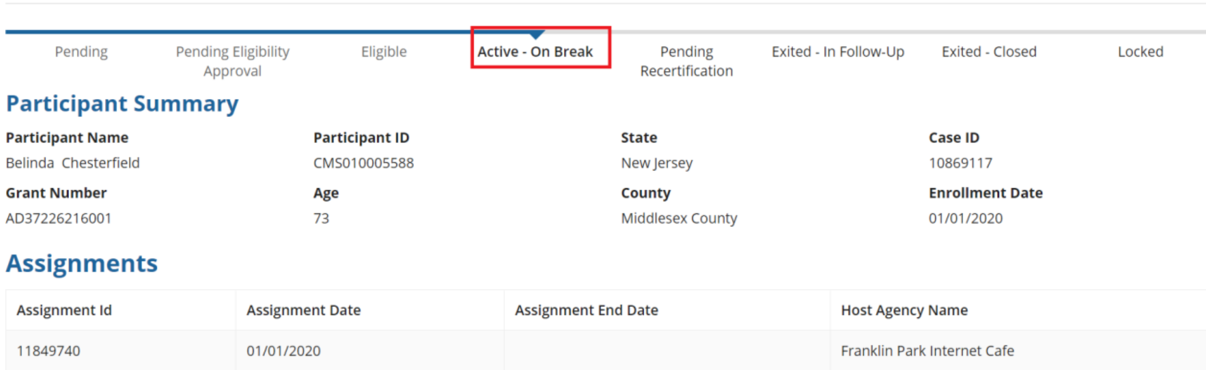
To add a break to a Participant, click the **ADD BREAK** button. For cases with a status of active, a user can also add a break via the **Related Actions** section.



Enter the break information, then click the **Save** button.



The **Status** of the Participant changes to **Active-On Break** once a break record is entered.

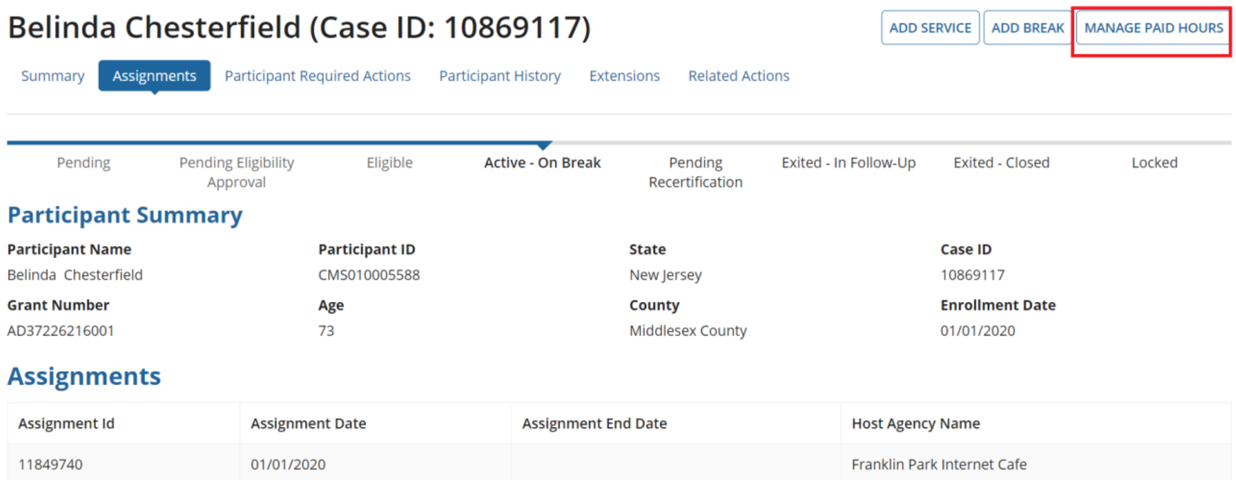


To verify and edit the **Approved Breaks**, click the **Approved Breaks** button.

The Break ID is formatted as hyperlinked text. When clicked, the Break in Services details screen is displayed. An edit button is displayed that, when clicked, allows the user to edit the details of the break record. At the bottom of the screen, two buttons labeled Cancel and Save allow the user to negate their changes or save the changes.

5. Manage Paid Hours

The Participant's **Paid hours** can be edited here. Click **MANAGE PAID HOURS** button. The user can also navigate to this screen through the **Related Actions** page.

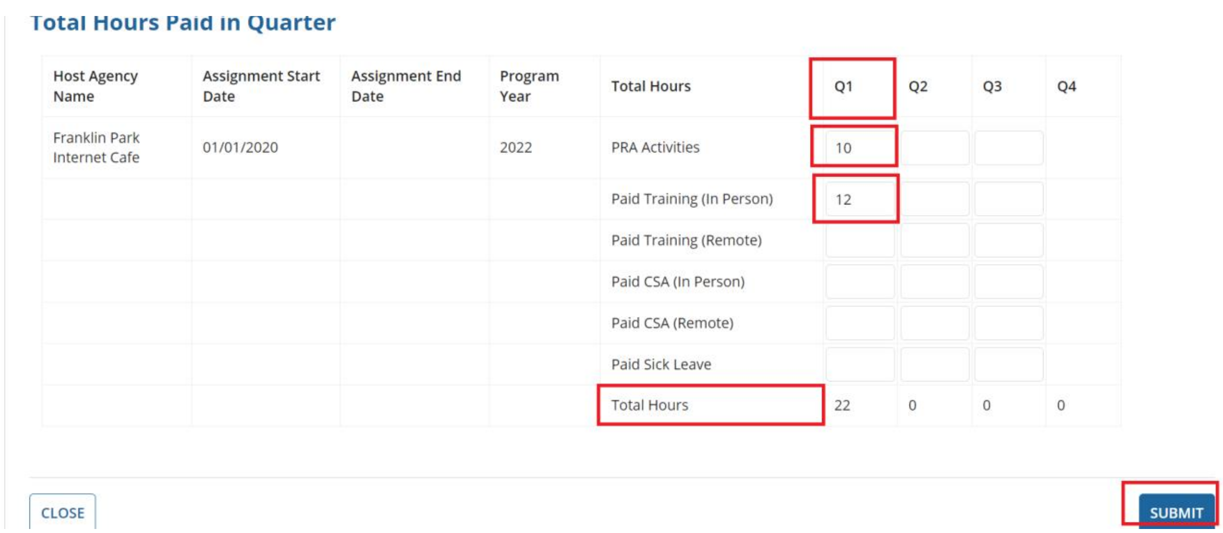


Manage Paid Hours displays information about **Host Agency Name**, and **Assignment Start Date**.

Enter the number of hours for each activity in the associated quarter.

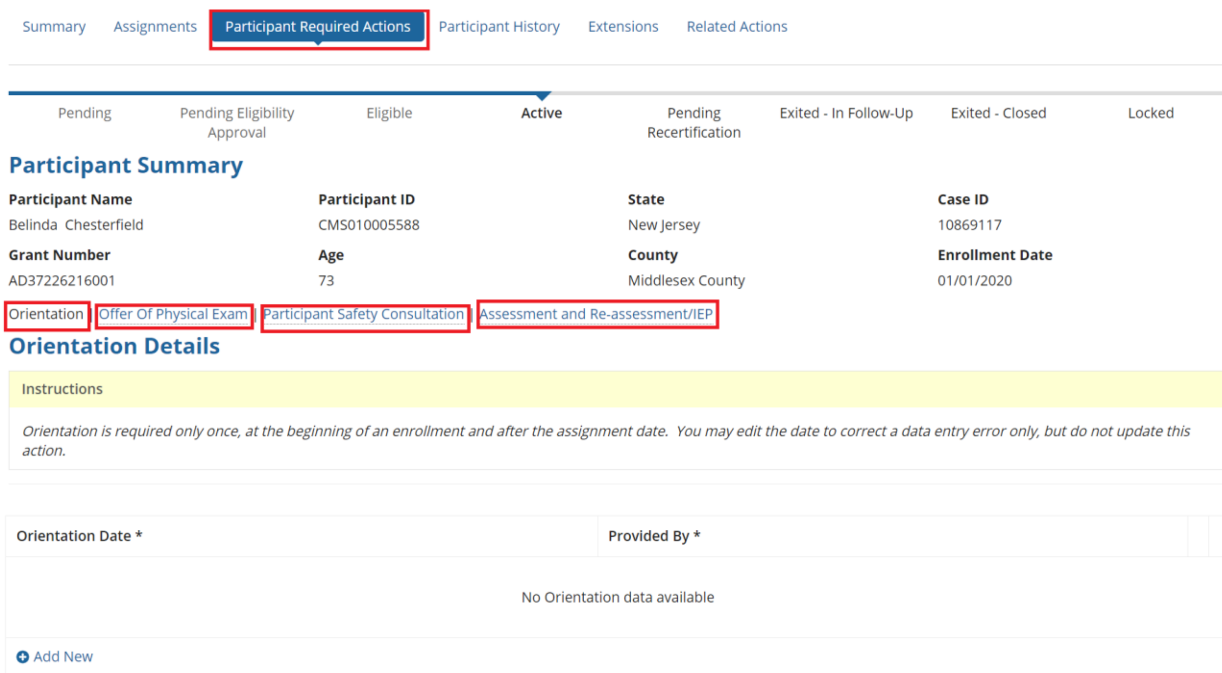
Once the number of hours has been entered, the **Total Hours** gets updated.

Click **Submit** to save the data entered.



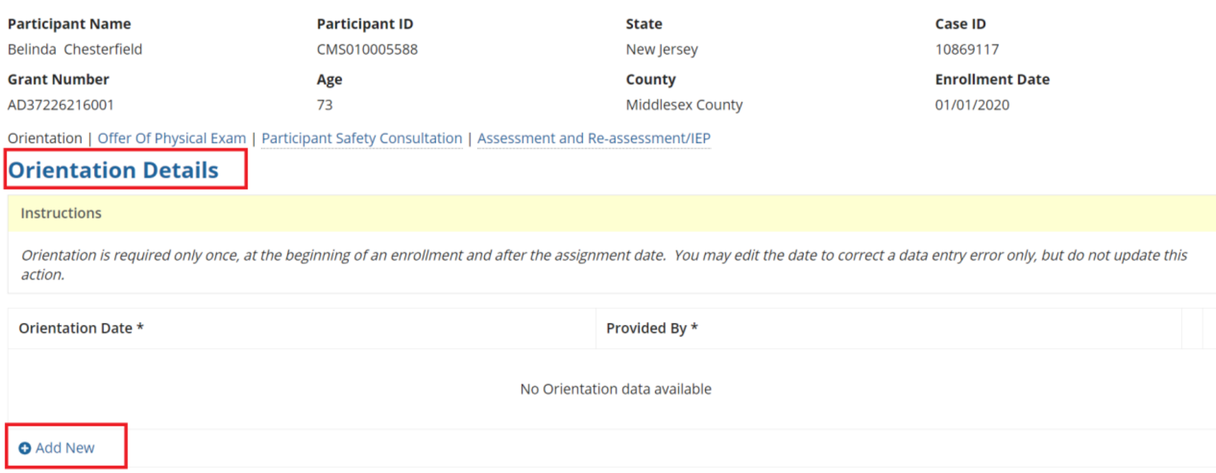
6. Participant Required Actions

On the **Participant Required Actions** screen, users can enter data to record Orientation, Physical Exam, Safety Consultation or Assessment records for participants. Once entered and saved, Orientation/Physical Exam/Safety Consultation/Assessment info will appear on the **Participant Required Actions** screen under its respective header.



6.1 Orientation Details

To add Orientation Details for a Participant. click the **Add New** button.



Once the information about the orientation is entered, the **Save icon** becomes visible. Click the **Save icon** to save the data. Click the **Bin** icon to delete the data.

Orientation Details

Instructions

Orientation is required only once, at the beginning of an enrollment and after the assignment date. You may edit the date to correct a data entry error only, but do not update this action.

Orientation Date *	Provided By *
01/01/2020	Somerset County Seniors

Once data is saved, it will appear on the main **Participant Required Actions** screen under **Orientation**.

Pending | Pending Eligibility Approval | Eligible | **Active** | Pending Recertification | Exited - In Follow-Up | Exited - Closed | Locked

Participant Summary

Participant Name	Participant ID	State	Case ID
Belinda Chesterfield	CMS010005588	New Jersey	10869117
Grant Number	**Age**	**County**	**Enrollment Date**
AD37226216001	73	Middlesex County	01/01/2020

Orientation | Offer Of Physical Exam | Participant Safety Consultation | Assessment and Re-assessment/IEP

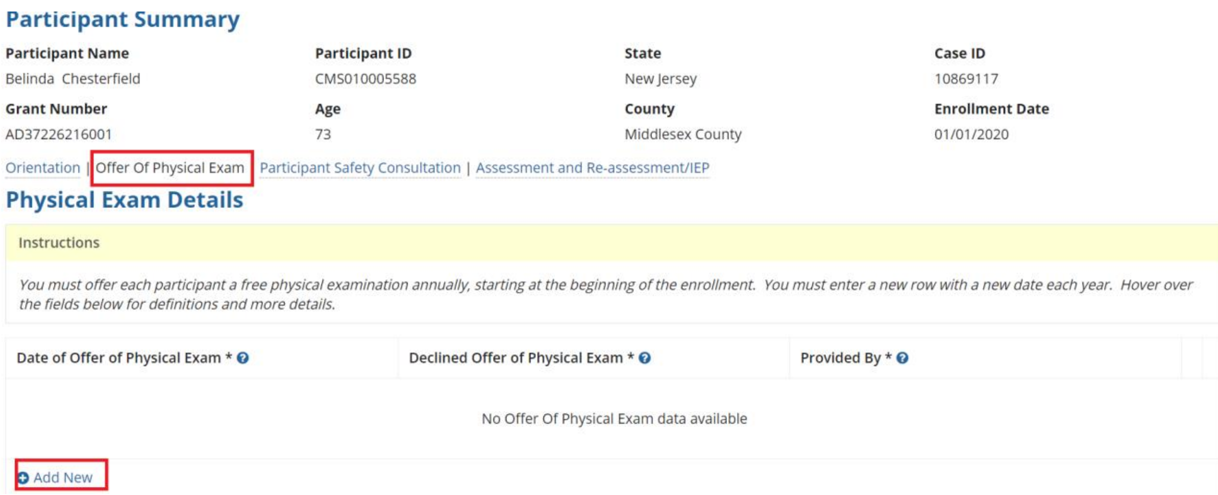
Orientation Details

Instructions

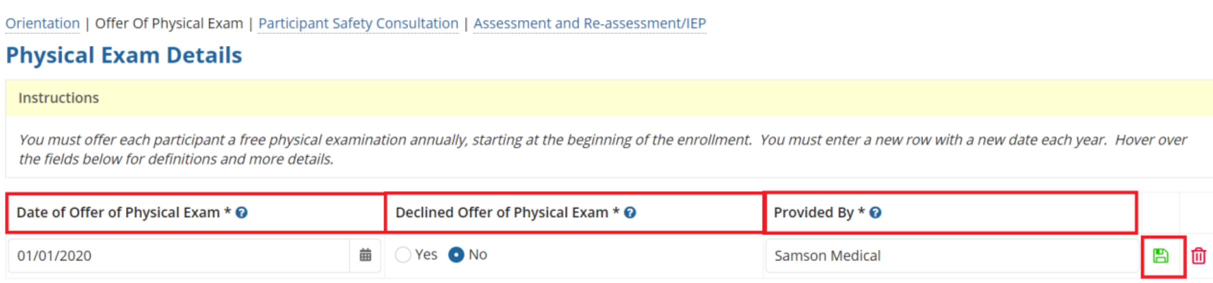
Orientation is required only once, at the beginning of an enrollment and after the assignment date. You may edit the date to correct a data entry error only, but do not update this action.

Orientation Date *	Provided By *
01/01/2020	Somerset County Seniors

6.2 Offer of Physical Exam

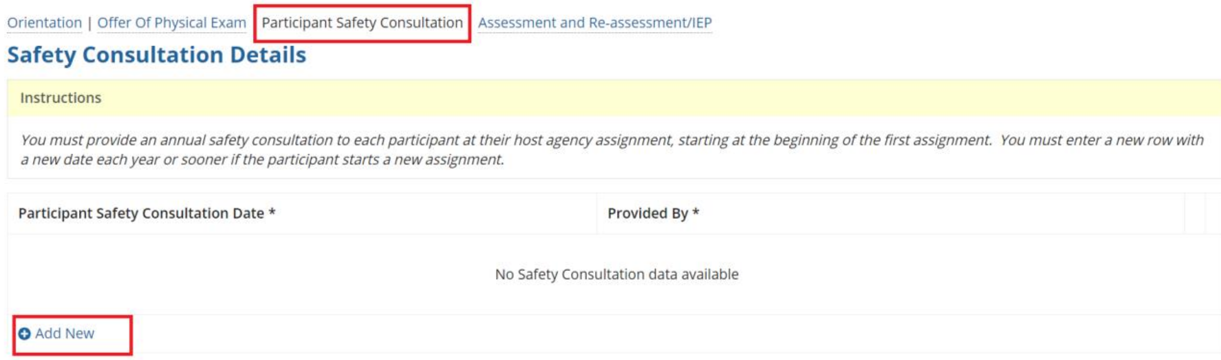


Click **Add New** to add the information about a physical exam**.** Once the values are entered in these fields, the **Save icon** becomes visible. Click the **Save icon** to save the data. Click the **Bin** icon to delete the data.

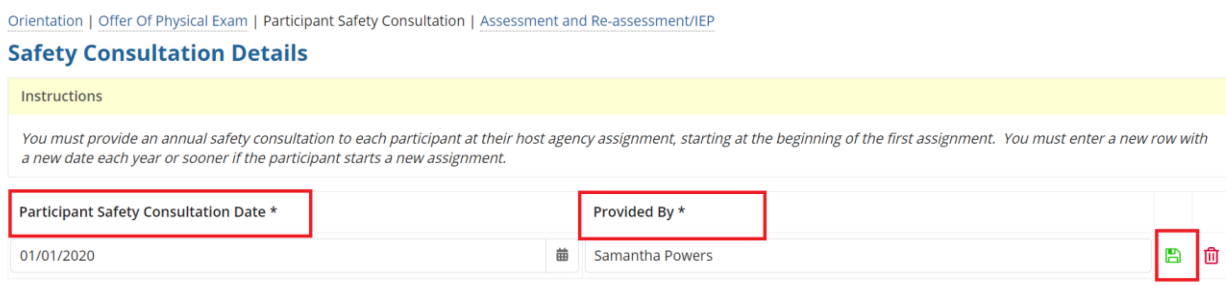


6.3 Safety Consultation Details

To add Safety Consultation details for a participant, click the **Add New** button toward the bottom of the **Safety Consultation** Screen.

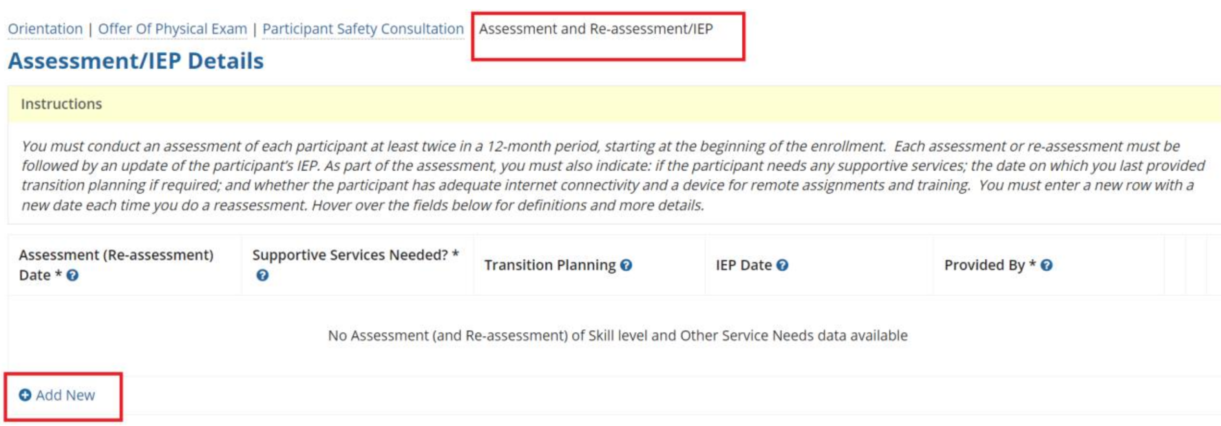


Once the information for the safety consultation is added, the save icon becomes visible. Click the **Save** icon to save the data. Click the **Bin** icon to delete the data.

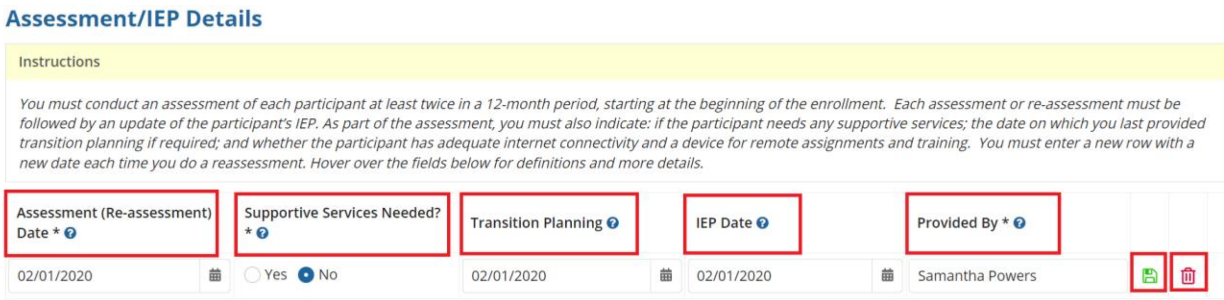


6.4 Assessment Details

To add assessment details for the person, click the **Add New** button on the **Assessment and Reassessment/IEP** tab.



Once the information for the assessment and re-assessment is entered, the **Save icon** becomes visible. Click the **Save icon** to save the data. Click the **Bin** icon to delete the data.



7. Participant History

The user will be redirected to the Participant History page when the **Participant History** button is clicked. The page will display separate tables based on records associated with a given case.

The first table presented displays all cases associated with the participant. The table displays the following columns:

1. **Case ID** – The unique case ID for the enrollment
2. **Grantee Name**
3. **Sub-Grantee Name**
4. **Application Date**
5. **Status**
6. **Exit Date**

The second table presented is labeled **Assignment History** and displays all assignments associated with the participant's cases. The table displays the following columns:

1. **Assignment ID** – The assignment ID is displayed as a hyperlink. When clicked, the user is redirected to the assignment page for the case associated with the assignment.
2. **Assignment Date**
3. **Assignment End Date**
4. **Host Agency Name**
5. **Host Agency ID**

The third table presented is labeled **Break History** and displays all assignments associated with the participant's assignments. The table displays the following columns:

1. **Break ID** – The unique ID for the break record
2. **Start Date**
3. **Expected End Date**
4. **Actual End Date**

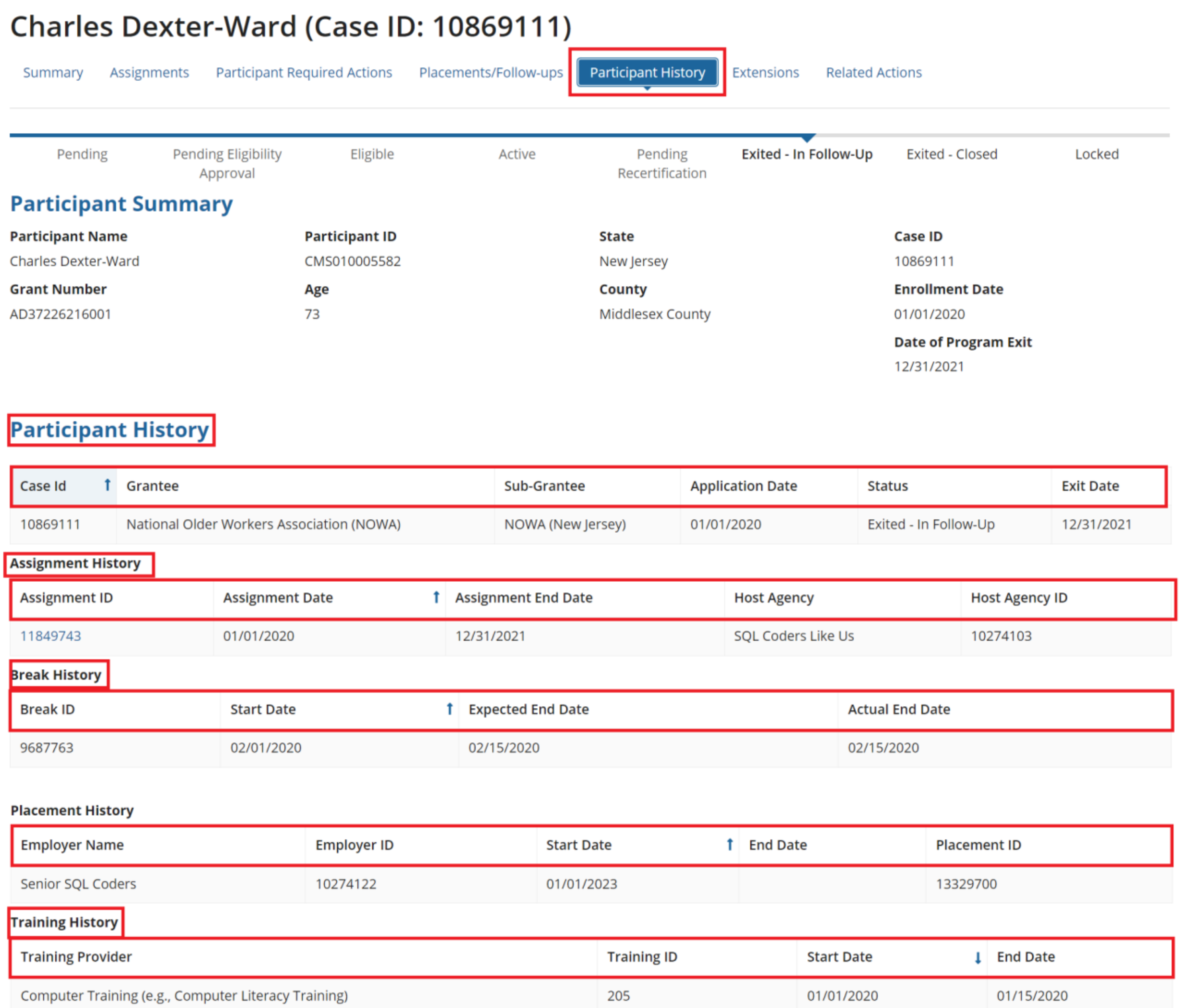
The fourth table presented is labeled **Placement History** and displays all placements associated with the participant's placement history. The table displays the following columns:

1. **Employer Name**
2. **Employer ID**

3. **Start Date**
4. **End Date**
5. **Placement ID**

The fifth table presented is labeled **Training History** and displays all training records associated with the participants' assignments. The table displays the following columns:

1. **Training Provider Name**
2. **Training ID** – The unique ID for the training Record
3. **Start Date**
4. **End Date**



8. Related Actions

This section lists the **Actions** that can be performed for a Participant. The following table provides actions that are available based on the status of the case.

(Note: Not all roles are authorized to perform all the actions listed below. See the user role permission matrix for specific details on the available actions by role.)

	Pending	Pending Eligibility Approval	Eligible	Withdrawn	Ineligible	Active	Active - On Break	Waitlist	Locked	Exited - Closed	Exited - In Follow Up
Edit Case	X	X	X	X	X	X		X		X	X
Withdrawn	X	X	X		X			X			
Add to Waitlist			X								
Manage Physical Exam						X					
Manage Paid Hours						X	X			X	X
Move Case						X	X				
Transfer Case						X	X				
Add Participant Required Action						X				X	X
Recertify Case						X	X				
Manage Program Introduction			X				X				
Manage Assignments						X		X		X	X
Add Service						X					X
Manage Training and Services						X					X
Manage Breaks in Service						X					X
Manage Waiver Factors	X	X	X			X	X				
Manage Extensions					X		X	X			
Add Exit							X	X			
Modify Exit										X	X
Manage/Add Placements											X

8.1 Manage Waiver Factors

A form is displayed below the summary for users to enter updates to waiver factors for a selected program year. A dropdown menu is displayed at the top of the form labeled **Program Year** that contains the current and prior program years. The field **75 and Older** is determined based on the date of birth of the participant and is strictly informational.

Summary Assignments Participant Required Actions Participant History Extensions Related Actions

Manage Waiver Factors

Pending | Pending Eligibility Approval | Eligible | Active | Pending Recertification | Exited - In Follow-Up | Exited - Closed | Locked

Participant Summary

Participant Name	Participant ID	State	Case ID
Belinda Chesterfield	CMS010005588	New Jersey	10869117
Grant Number	**Age**	**County**	**Enrollment Date**
AD37226216001	73	Middlesex County	01/01/2020

Program Year

2022

Severe Disability
- Yes
- No (selected)

Last Updated Date
01/17/2023

Frail
- Yes (selected)
- No

Last Updated Date *
01/17/2023

Old Enough but Not Receiving SS Title I
- Yes
- No (selected)

Last Updated Date
01/17/2023

Severely Limited Employment Prospects
- Yes
- No (selected)

Last Updated Date
01/17/2023

Limited English Proficiency
- Yes
- No (selected)

Last Updated Date
01/17/2023

Low Literary Status
- Yes
- No (selected)

Last Updated Date
01/17/2023

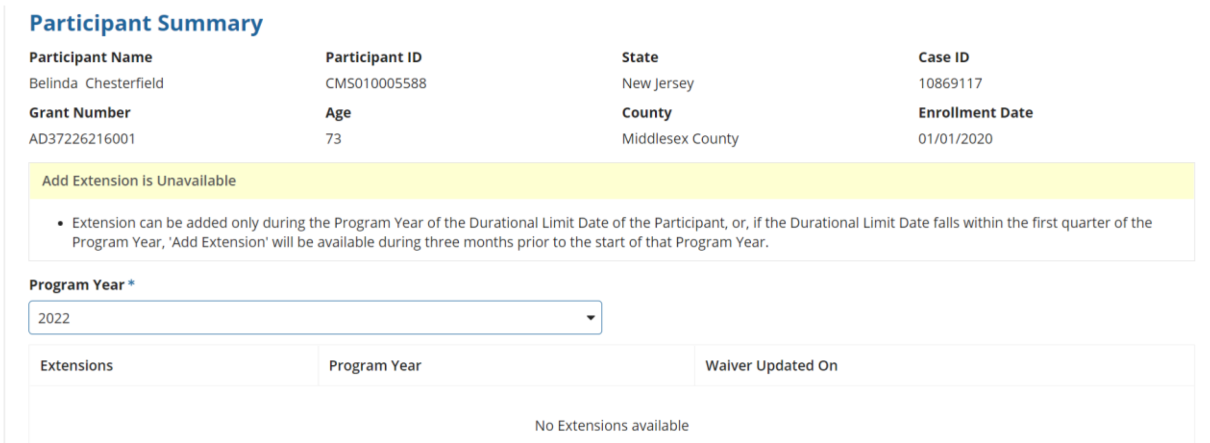
Formerly Incarcerated
- Yes
- No (selected)

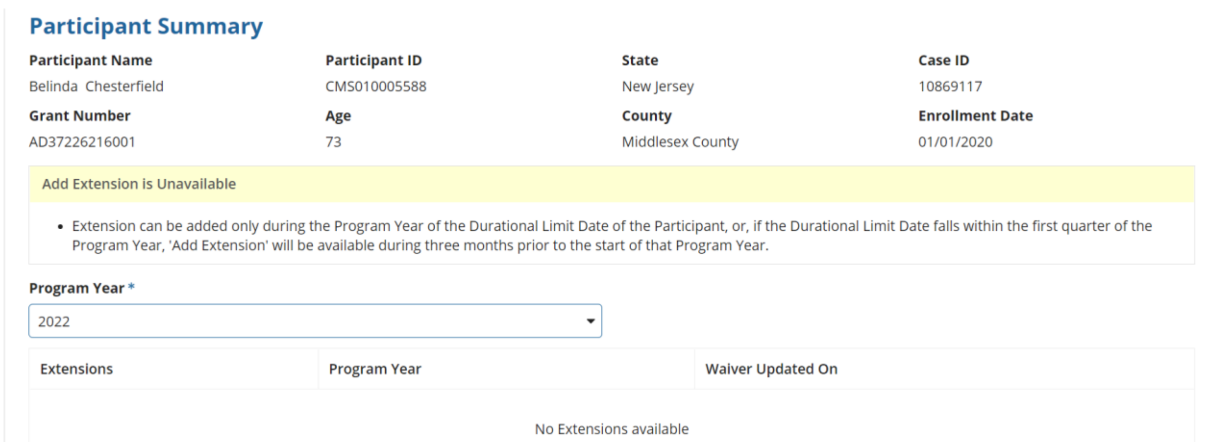
Last Updated Date
mm/dd/yyyy

75 or Older
- Yes
- No

CANCEL SAVE

8.2 Manage Extensions





Users can view extensions granted to participants through the manage extensions. A dropdown labeled Program Year is displayed in the dropdown. When the user selects a program year, the extension is shown in a table below. The following columns are displayed in the table:

- **Extensions**
- **Program Year**
- **Waiver Updated On**

If the user is not eligible for an extension, the following message appears below the participant summary:

> Extensions can be added only during the Program Year of the Durational Limit Date of the Participant, or, if the Durational Limit Date falls within the first quarter of the program year. Add Extension will be available during the three months prior to the start date of that Program Year.

If the user is eligible for an extension, a white button labeled **ADD** is displayed below the participant summary. The Grantee Administrator or Program Analyst is navigated to the add extension screen when the button is clicked.

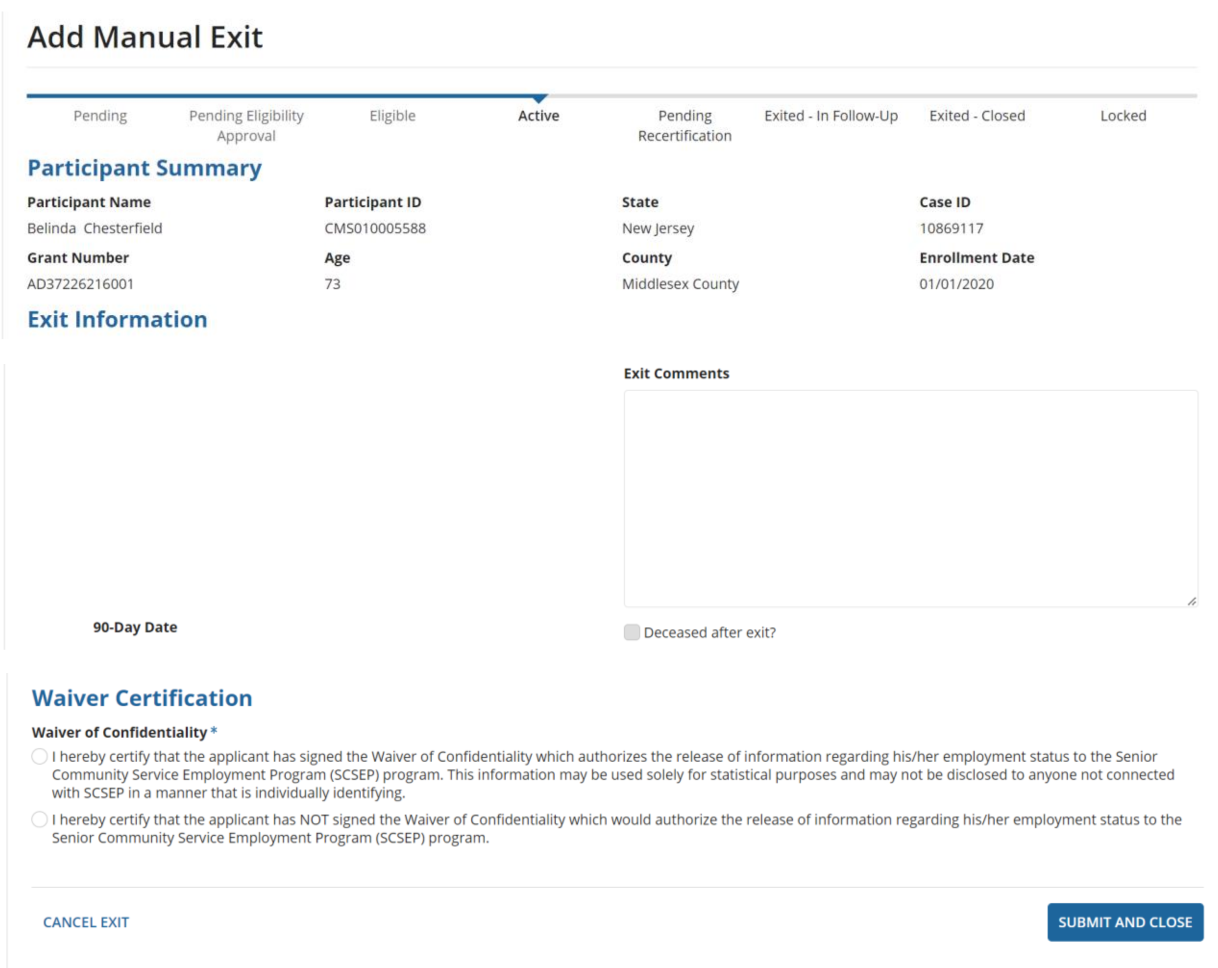
8.3 Add Exit

This form allows the user to add an exit to a case. The following fields are among those displayed below the Participant Summary information:

Category of Exit: A dropdown menu displays two categories of exit.

> If the user selects **Unsubsidized Employment**, the label **Unsubsidized Employment Type** and two radio buttons labeled **Regular Employment** and **Self-Employment** appear below the dropdown.
>
> If the user selects **Other Reason for Exit** a dropdown labeled **Other Reason for Exit** appears below the Category of Exit Dropdown. If the user selects **Exclusions at Exit** from the **Other Reason for Exit** dropdown, an additional dropdown labeled **Exclusions at Exit** appears below the **Other Reason for Exit** dropdown.

Waiver of Confidentiality



Add Manual Exit

Pending | Pending Eligibility Approval | Eligible | Active | Pending Recertification | Exited - In Follow-Up | Exited - Closed | Locked

Participant Summary

Participant Name	Participant ID	State	Case ID
Belinda Chesterfield	CMS010005588	New Jersey	10869117
Grant Number	**Age**	**County**	**Enrollment Date**
AD37226216001	73	Middlesex County	01/01/2020

Exit Information

Exit Comments

90-Day Date

Deceased after exit?

Waiver Certification

Waiver of Confidentiality *

I hereby certify that the applicant has signed the Waiver of Confidentiality which authorizes the release of information regarding his/her employment status to the Senior Community Service Employment Program (SCSEP) program. This information may be used solely for statistical purposes and may not be disclosed to anyone not connected with SCSEP in a manner that is individually identifying.

I hereby certify that the applicant has NOT signed the Waiver of Confidentiality which would authorize the release of information regarding his/her employment status to the Senior Community Service Employment Program (SCSEP) program.

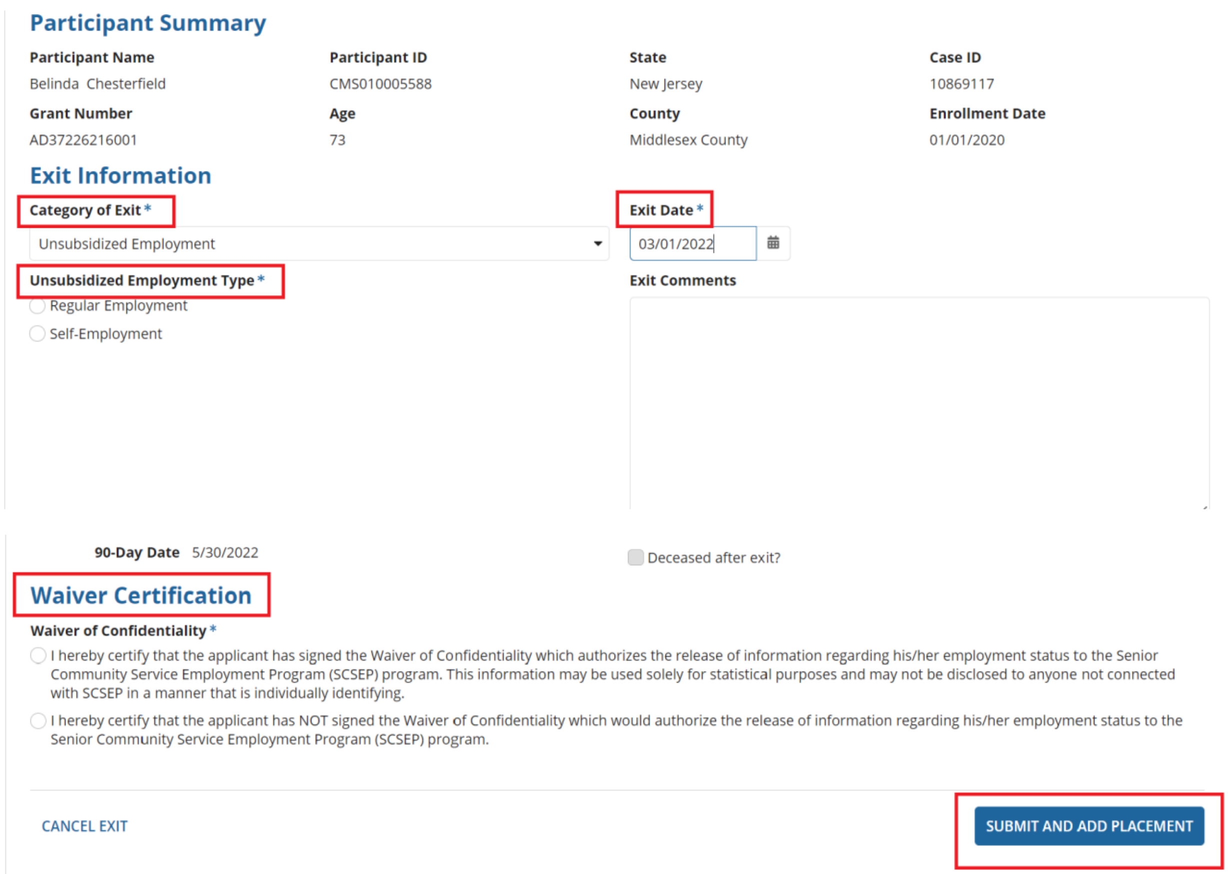
CANCEL EXIT

SUBMIT AND CLOSE

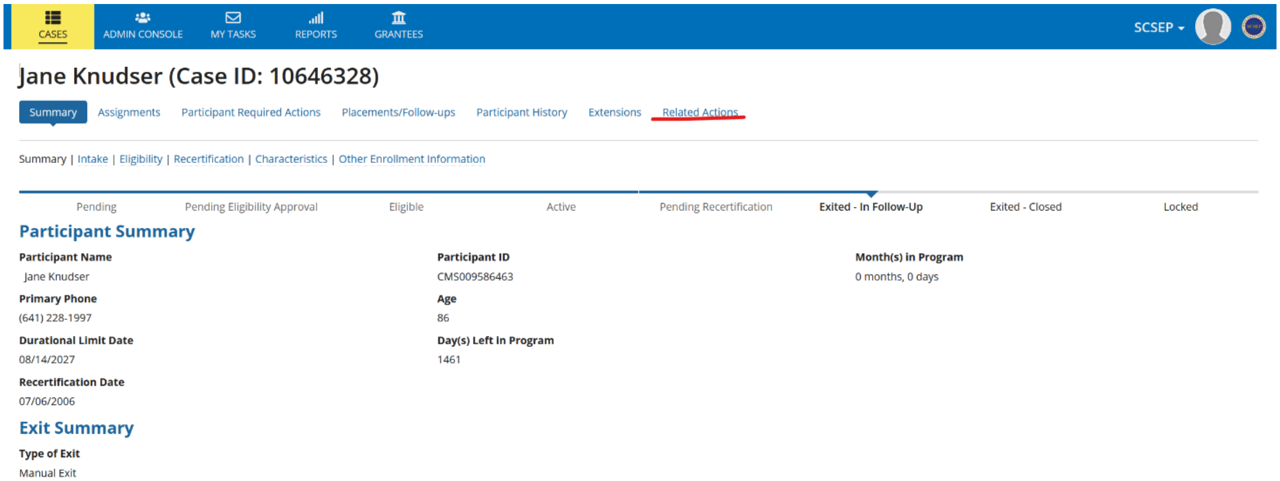
When the user selects **Unsubsidized Employment** in the **Category of Exit** dropdown, a button labeled **SUBMIT AND ADD PLACEMENT** is displayed at the bottom right corner of the screen. The user is directed to the Placement page when this button is clicked.

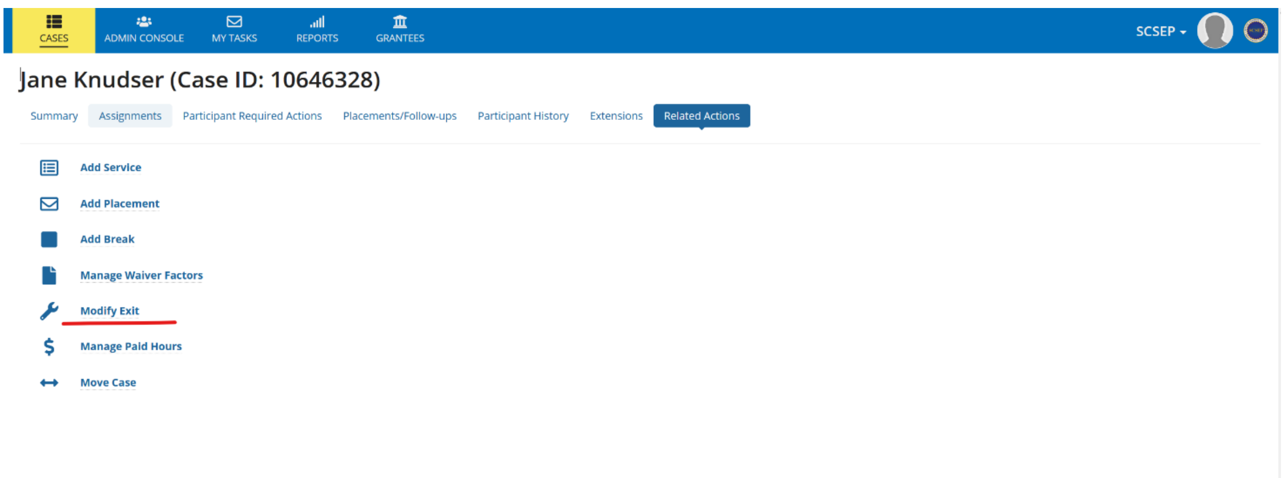
When the user selects **Other Reason for Exit** in the **Category of Exit** dropdown, a button labeled **SUBMIT AND CLOSE** is displayed at the bottom right corner of the screen. The user is directed to the main Cases page when this button is clicked.

A button labeled **Cancel Exit** is displayed in the bottom left corner of the screen. The exit is not saved, and the user is directed to the main Cases page when the button is clicked.



It is important to note that this **Exit** data can be modified in the future by selecting **Modify Exit** through the **Related Actions** tab.

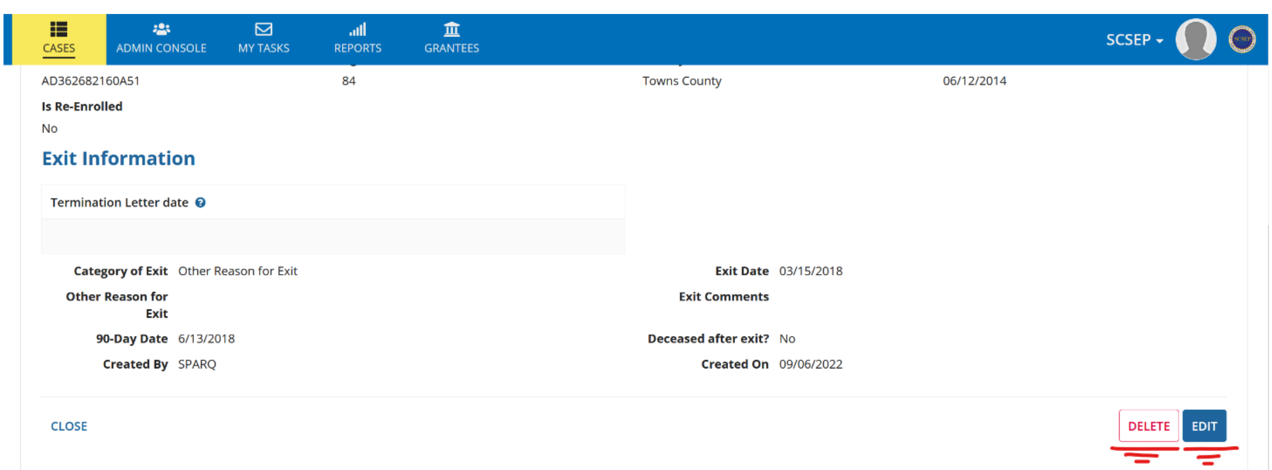




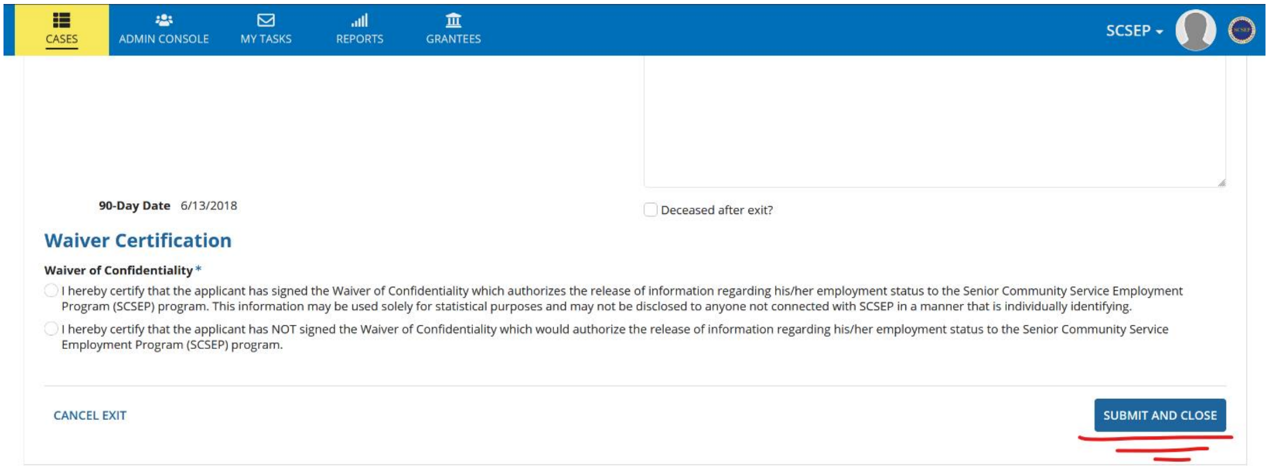
This will present you with the option to either **DELETE** or **EDIT** the participant's Exit.

If you wish to **DELETE** the Exit, select **DELETE** and follow the prompts on the following screens.

If you wish to **EDIT** the Exit, select **EDIT.** The same fields that were available when the Exit was added are now available to be edited.

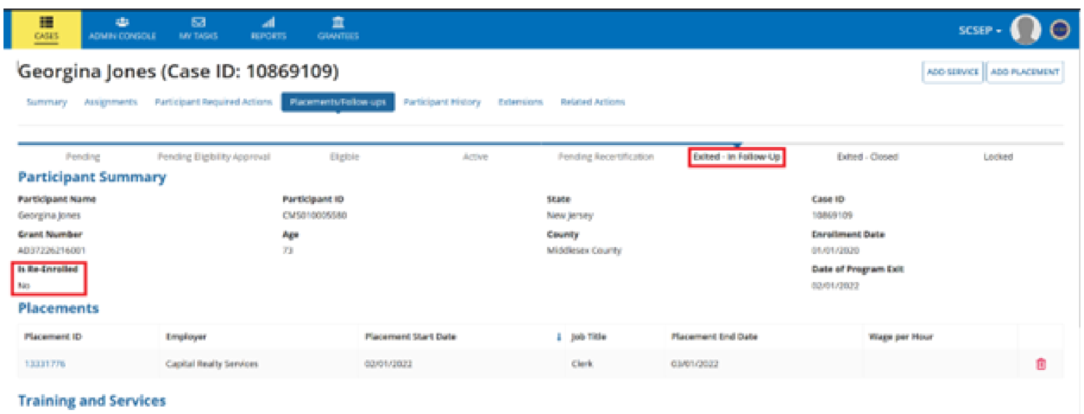


After completing your edits, select **SUBMIT AND CLOSE.**

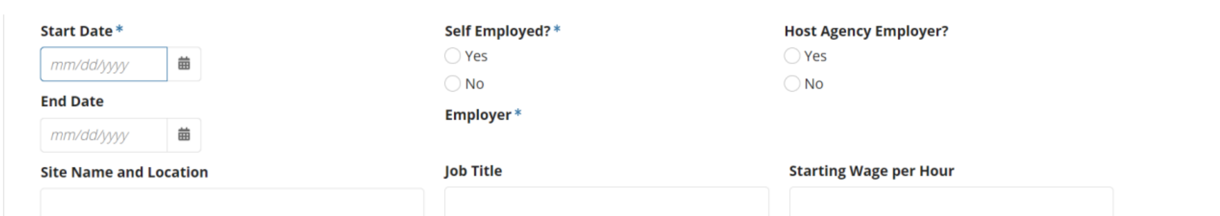


8.4 Add Placement

This section is for adding **Placement** for the Participant. Once the **Exit** has been added to the Participant, the **Status** of the Participant changes to **Exited-In Follow-Up** and the **Is Re-Enrolled** field will populate.



The **Is Re-Enrolled** field notes whether the participant has been re-enrolled in SCSEP, or if this is their first enrollment in the program.



CIO
OFFICE OF THE CHIEF INFORMATION OFFICER

Survey Contact
-- Select a contact --

Supervisor
-- Select a supervisor --

Select only if Supervisor is different than Contact

Was Placement result of a Substantial Service Provided to Employer by Sub-Grantee? *
- Yes
- No

Did employer provide an OJE training site? *
- Yes
- No

Training-related Placement?
- Yes
- No

Job Code *
-- Select a job code --

Comments

0 / 2000

Average Hours

Type of Placement *
- Full-time
- Part-time

Benefits
- Health Insurance
- Sick Leave
- Pension / Profit Sharing
- Vacation
- Transportation
- Room and board
- Other
- None

Check all that apply. If "None" is selected, you cannot select any other value.

High-growth Placement
--- Please select a value ---

Survey Information

Enter the last 5 digits of the Customer Service Survey Number in the form below.

Survey 1 Eligibility Date	Customer Satisfaction Survey 1 #	Date of Delivery
mm/dd/yyyy		mm/dd/yyyy
Survey 2 Eligibility Date	**Customer Satisfaction Survey 2 #**	**Date of Delivery**
		mm/dd/yyyy
Survey 3 Eligibility Date	**Customer Satisfaction Survey 3 #**	**Date of Delivery**
		mm/dd/yyyy

Follow-Up 1 (7/1/2022 - 9/30/2023)

Follow-Up 1 Date
mm/dd/yyyy

Any wages for second quarter after exit quarter?
- Yes
- No

Follow-Up 1 Notes

0 / 2000

Follow-Up 2 (10/1/2022 - 9/30/2023)

Follow-Up 2 Date
mm/dd/yyyy

Earnings for the Second Quarter After the Exit Quarter?

Follow-Up 2 Notes

Follow-Up 3 (1/1/2023 - 9/30/2023)

Follow-Up 3 Date
mm/dd/yyyy

Any wages for fourth quarter after exit quarter?
- Yes
- No

Follow-Up 3 Notes

0 / 2000

CANCEL PLACEMENT

SUBMIT PLACEMENT

Enter all Placement details and click **Submit Placement**. Once the **Placement** details have been entered, the **Summary** of the Participant is updated.

Pending	Pending Eligibility Approval	Eligible	Active	Pending Recertification	**Exited - In Follow-Up**	Exited - Closed	Locked

Participant Summary

Participant Name	Participant ID	State	Case ID
Georgina Jones	CMS010005580	New Jersey	10869109
Grant Number	**Age**	**County**	**Enrollment Date**
AD37226216001	73	Middlesex County	01/01/2020
			Date of Program Exit
			02/01/2022

Placements

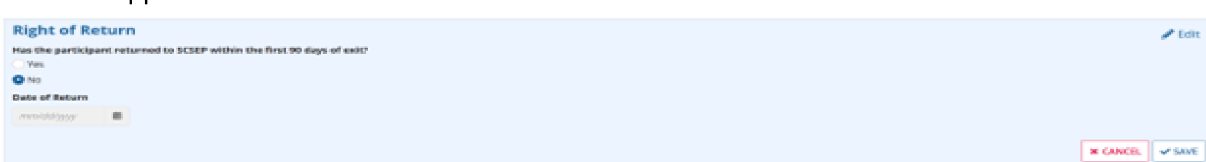
Placement ID	Employer	Start Date ↓	Job Title	End Date	Starting Wage per Hour	
13329600	Franklin Park Tech Center	02/02/2022	Programmer		$20.00	

Training and Services

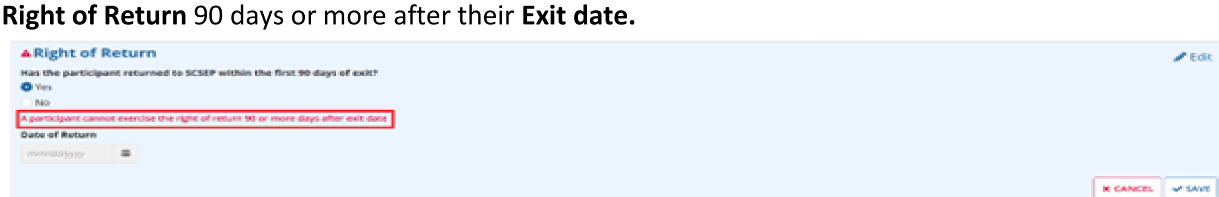
Category	Type	Service Provider	Start Date	Expected End Date
No Services Entered				

The **Placement** details can also be filled in later. To fill in the details later, click **Placement/Follow-ups** and click **Add Placement**. Note that **Right of Return** data can be entered **after** the **Placement** has been created.
To enter **Right of Return** data, open the **Placement** by clicking on its ID number. Scroll until the **Right of Return** section is shown and then select the **Edit** button.

Enter the applicable data and select **SAVE.**

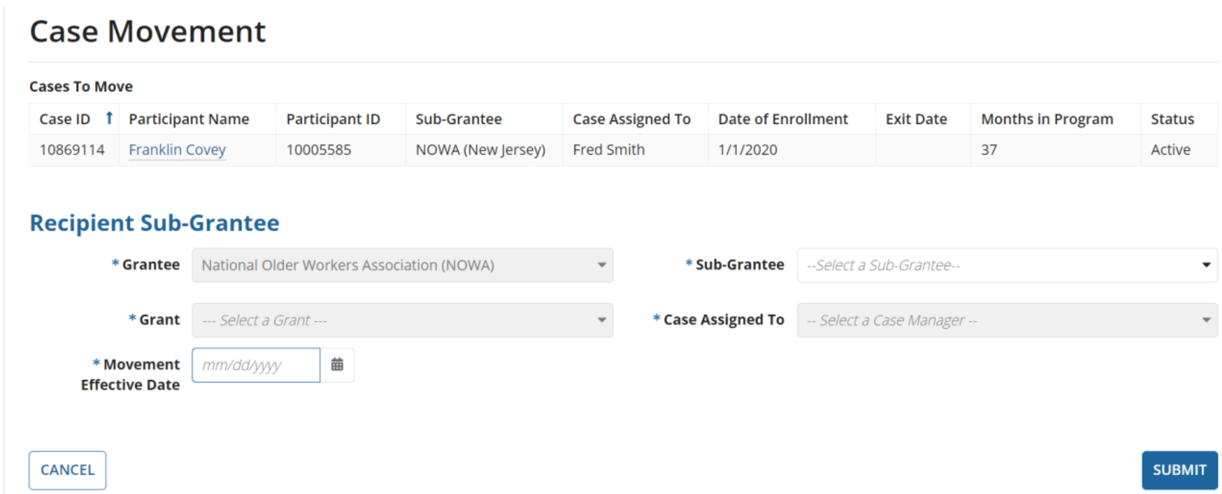


Note that the **Right of Return** data cannot be marked as **Yes** if the participant is attempting to exercise **Right of Return** 90 days or more after their **Exit date.**

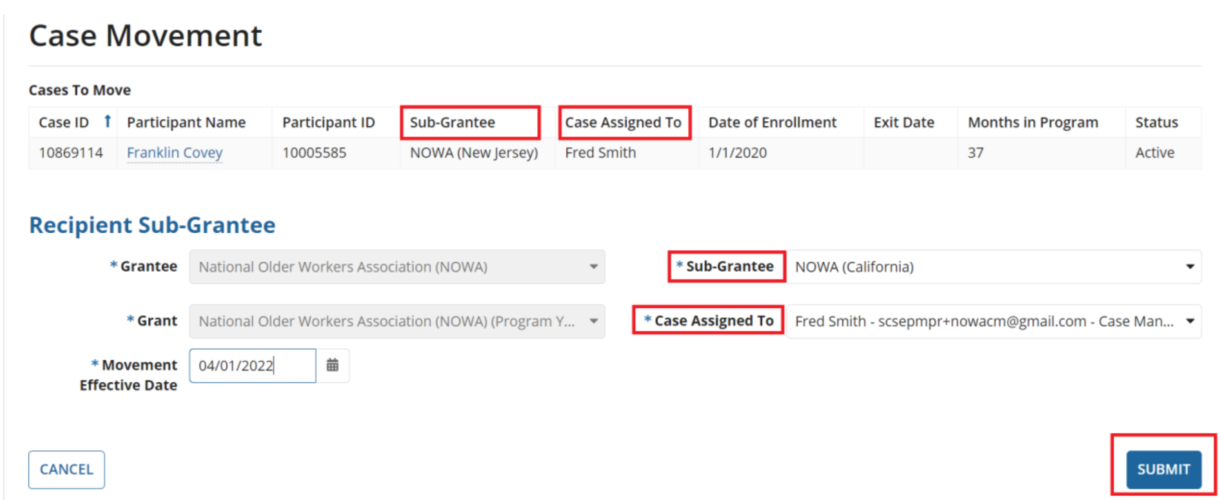


9. Move/Transfer Case

9.1 Move Case



A Participant's case can be moved from one **Sub-Grantee** to another. The **Grantee** field is filled by default. Selecting a value for the **Sub-Grantee** field will auto populate the **Grant** field. Enter the **Movement Effective Date**. Select **Case Manager**. Click **Submit** to move the case.



Upon clicking **Submit**, the Case Movement table on the screen is updated to reflect the new sub-grantee and case manager.

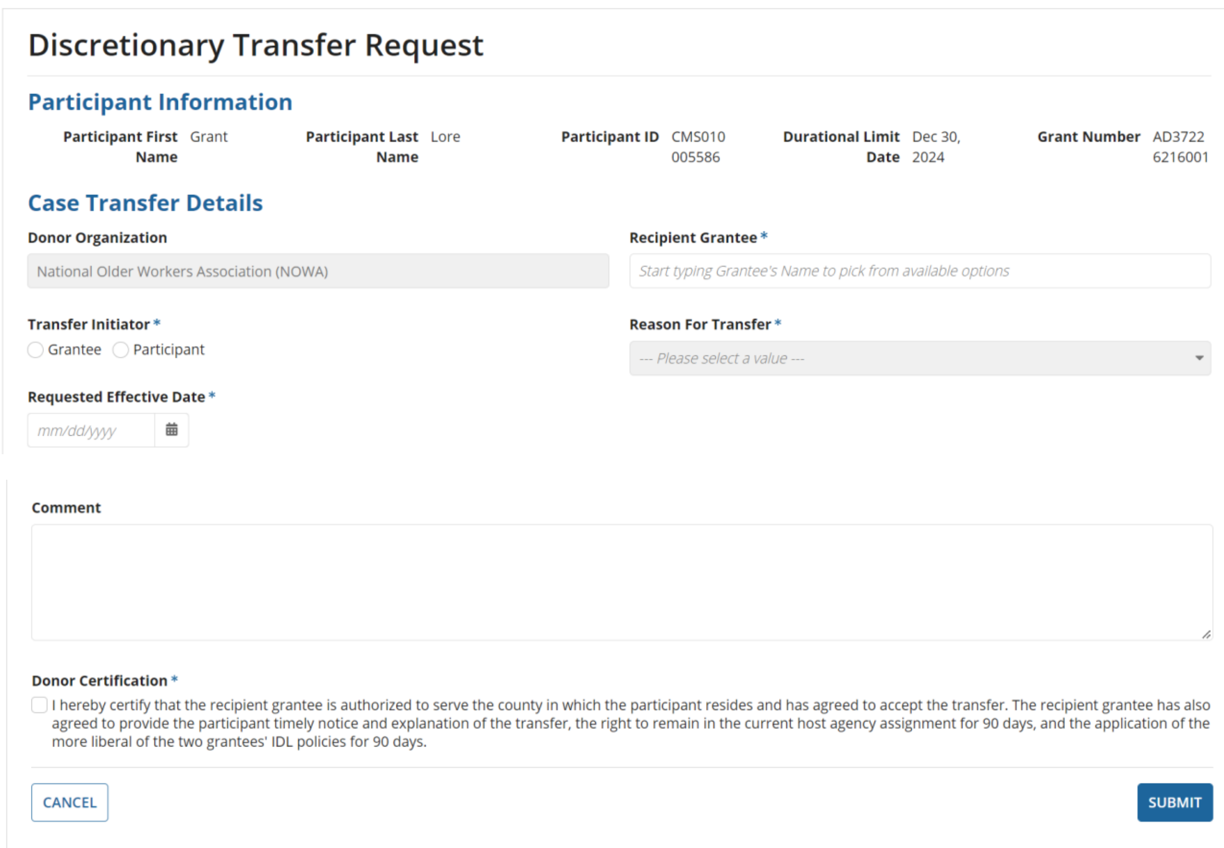
Case Movement

Cases To Move

Case ID	Participant Name	Participant ID	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
10869114	Franklin Covey	10005585	NOWA (California)	Fred Smith	1/1/2020		37	Active

9.2 Transfer Case

Participants can be moved from One **Grantee** to another. Note that an Assignment is now created for the recipient record from the donor record after a transfer.



Discretionary Transfer Request

Participant Information

Participant First Name	Participant Last Name	Participant ID	Durational Limit Date	Grant Number
Grant	Lore	CMS010 005586	Dec 30, 2024	AD3722 6216001

Case Transfer Details

Donor Organization: National Older Workers Association (NOWA)

Recipient Grantee *: Start typing Grantee's Name to pick from available options

Transfer Initiator *: Grantee / Participant

Reason For Transfer *: --- Please select a value ---

Requested Effective Date *: mm/dd/yyyy

Comment

Donor Certification *

I hereby certify that the recipient grantee is authorized to serve the county in which the participant resides and has agreed to accept the transfer. The recipient grantee has also agreed to provide the participant timely notice and explanation of the transfer, the right to remain in the current host agency assignment for 90 days, and the application of the more liberal of the two grantees' IDL policies for 90 days.

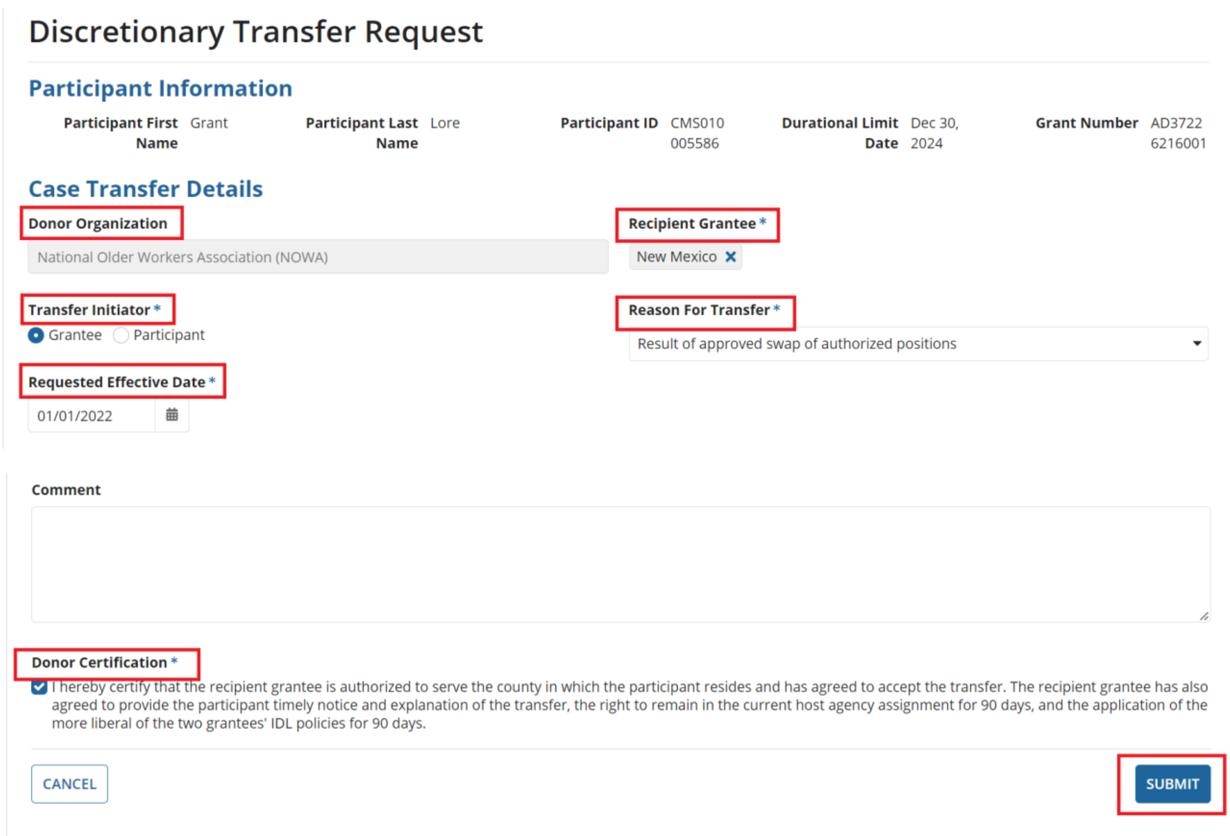
CANCEL SUBMIT

The **Donor Organization** field is filled by default. Select a value for the **Recipient-Grantee** field. Choose an option for **Transfer Initiator.**

1 **Grantee** option is chosen

a. Choose a value for **Reason for Transfer**
b. Enter a value for **Requested Effective Date**
c. Acknowledge Donor Certification

Click **SUBMIT** to save changes.



Discretionary Transfer Request

Participant Information

Participant First Name: Grant
Participant Last Name: Lore
Participant ID: CMS010005586
Durational Limit Date: Dec 30, 2024
Grant Number: AD37226216001

Case Transfer Details

Donor Organization: National Older Workers Association (NOWA)
Recipient Grantee *: New Mexico
Transfer Initiator *: Grantee / Participant
Reason For Transfer *: Result of approved swap of authorized positions
Requested Effective Date *: 01/01/2022

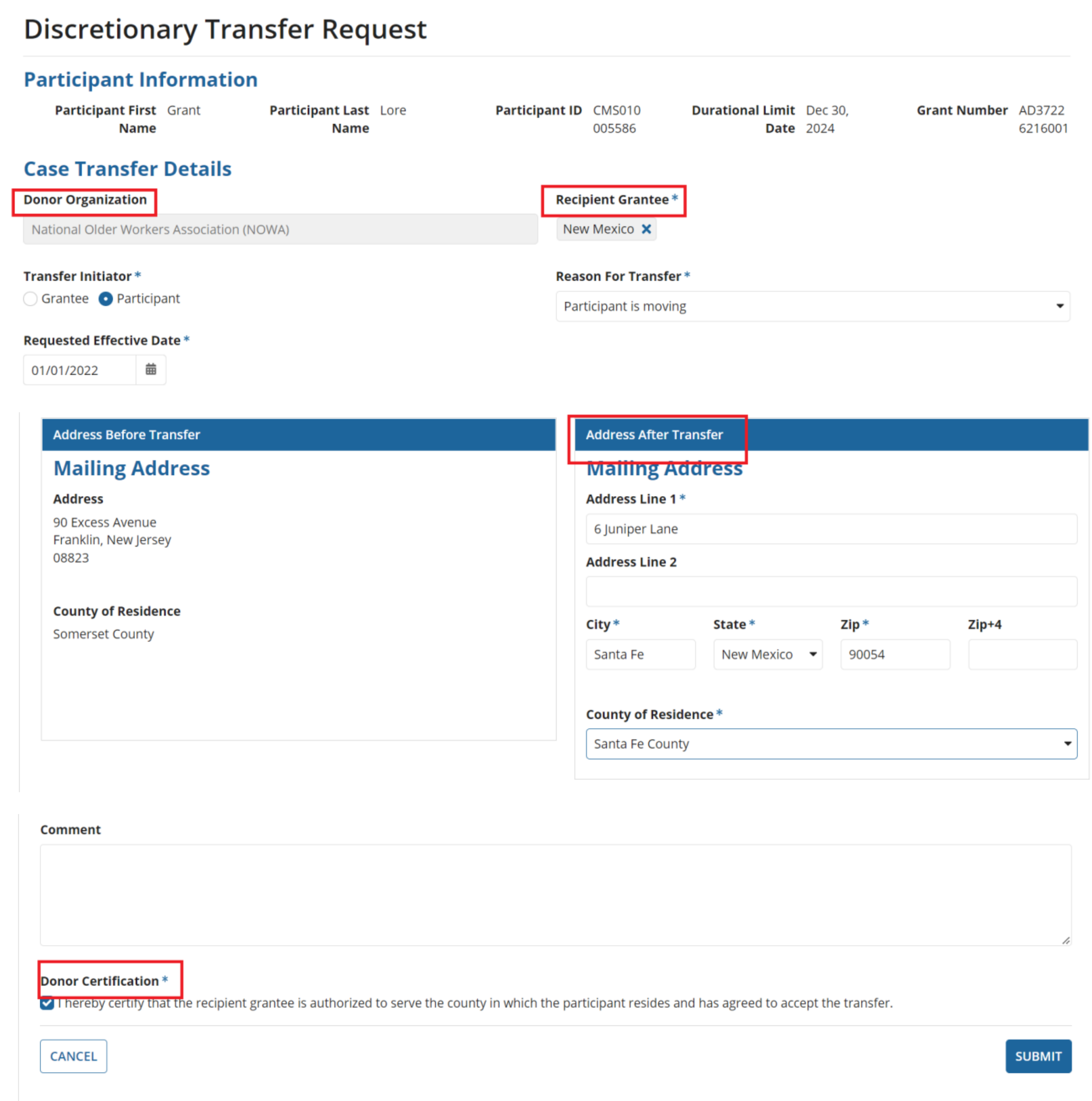
Comment

Donor Certification *
I hereby certify that the recipient grantee is authorized to serve the county in which the participant resides and has agreed to accept the transfer. The recipient grantee has also agreed to provide the participant timely notice and explanation of the transfer, the right to remain in the current host agency assignment for 90 days, and the application of the more liberal of the two grantees' IDL policies for 90 days.

CANCEL SUBMIT

2 **Participant** option is chosen
   a. Chose a value for **Reason for Transfer**
   b. Enter a value for **Requested Effective Date**
   c. Fill in the mandatory (*) fields in **Residence Address After Transfer**
   d. Acknowledge Donor Certification

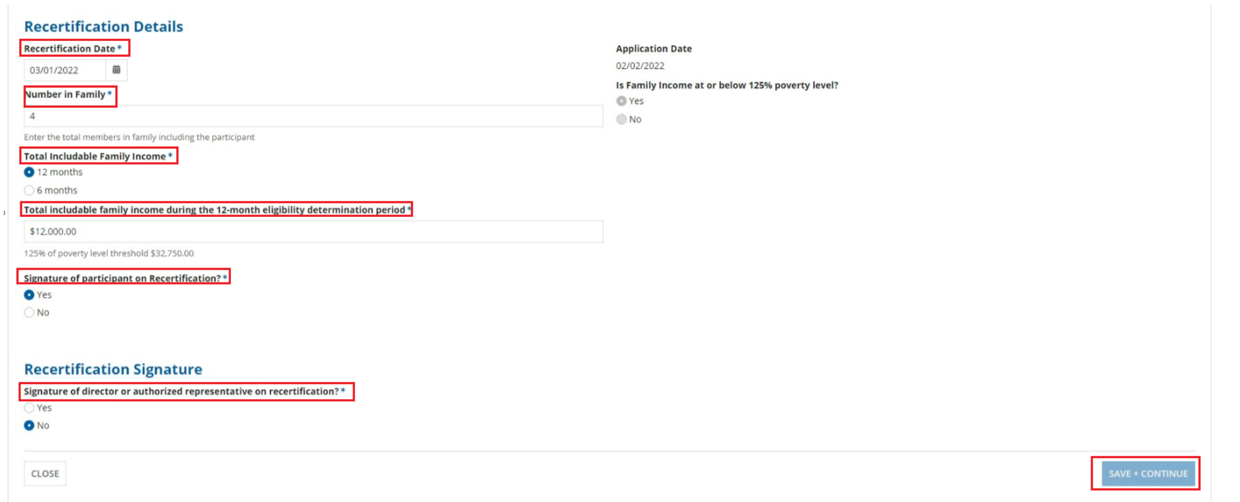
Click **SUBMIT** to save changes.

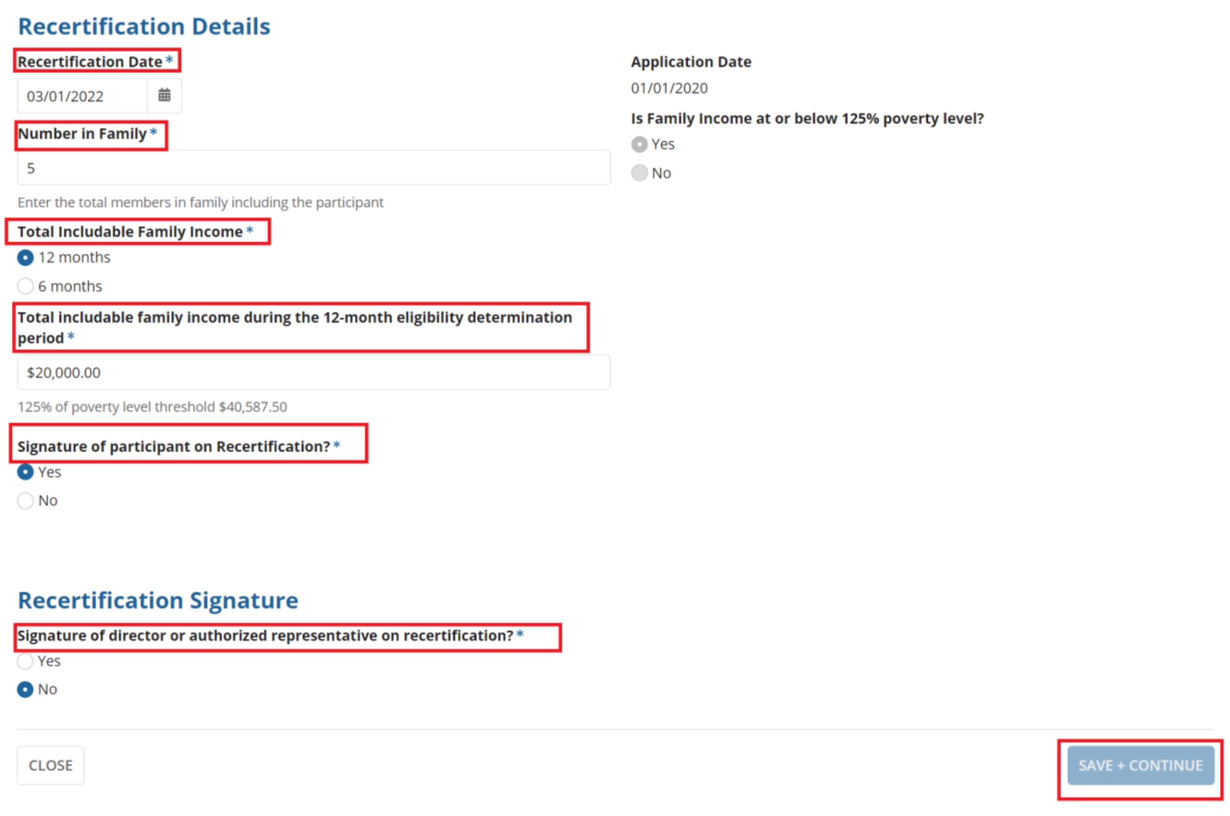


10. Recertify Case

To recertify a participant, enter value for **Recertification Date, Number in Family, Total includable Family Income for the Eligibility Period.**
Choose an option for **Total Includable Family Income, Signature of Participant on Recertification, Signature of Director or Authorized Representative on Recertification.**

Choosing the option **No** for **Signature of Participant on Recertification, Signature of Director or Authorized Representative on Recertification** will not allow the user to **SAVE + CONTINUE**.





Choosing the option **YES** for **Signature of Participant on Recertification, Signature of Director or Authorized Representative on Recertification** will allow the user to click **SAVE + CONTINUE**.

Recertification Details

Recertification Date *

03/01/2022

Number in Family *

5

Enter the total members in family including the participant

Total Includable Family Income *

- (•) 12 months
- ( ) 6 months

Total includable family income during the 12-month eligibility determination period *

$20,000.00

125% of poverty level threshold $40,587.50

Signature of participant on Recertification? *

- (•) Yes
- ( ) No

Application Date

01/01/2020

Is Family Income at or below 125% poverty level?

- (•) Yes
- ( ) No

Signature of participant on Recertification? *

- (•) Yes
- ( ) No

Recertification Signature

Signature of director or authorized representative on recertification? *

- (•) Yes
- ( ) No

Date/Timestamp Jan 18, 2023 1:40 PM

CLOSE SAVE + CONTINUE

Upon clicking **SAVE+CONTINUE**, Recertification Eligibility Determination is displayed.

Participant Summary

Participant Name	Participant ID	State	Case ID
Grant Lore	CMS010005586	New Jersey	10869115
Status	**Age**	**County**	**Enrollment Date**
Active	73	Somerset County	01/01/2020
Grant Number			
AD37226216001			

System Eligibility Determination: Eligible

Reasons for Eligibility

- The participant is Unemployed.
- The participant's income is at or below 125% Poverty Level.
- The participant's age is within the allowed range.

Recertification Eligibility Determination

SCSEP Eligible? *

- ( ) Yes
- ( ) No

PREVIOUS SUBMIT

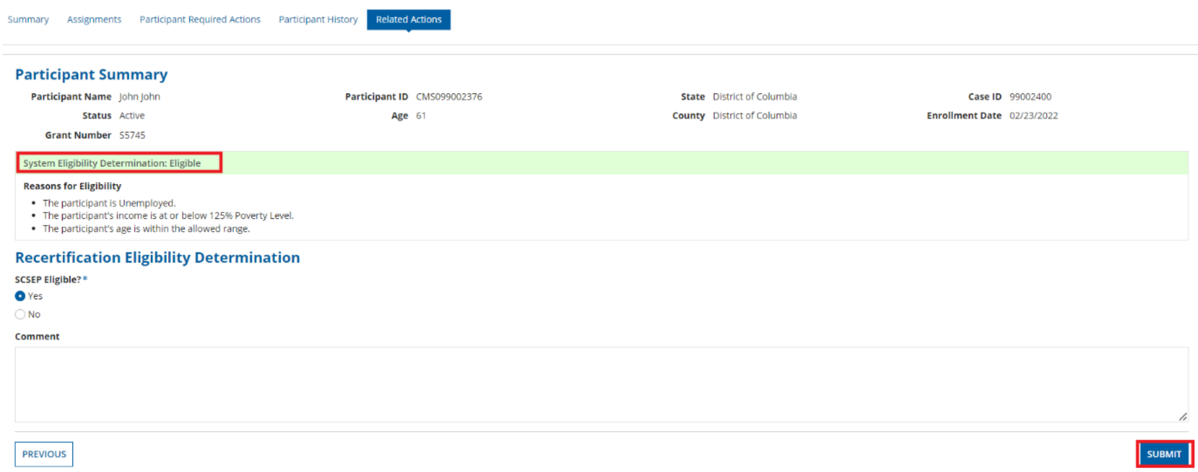
Choose an option for **SCSEP Eligible**.

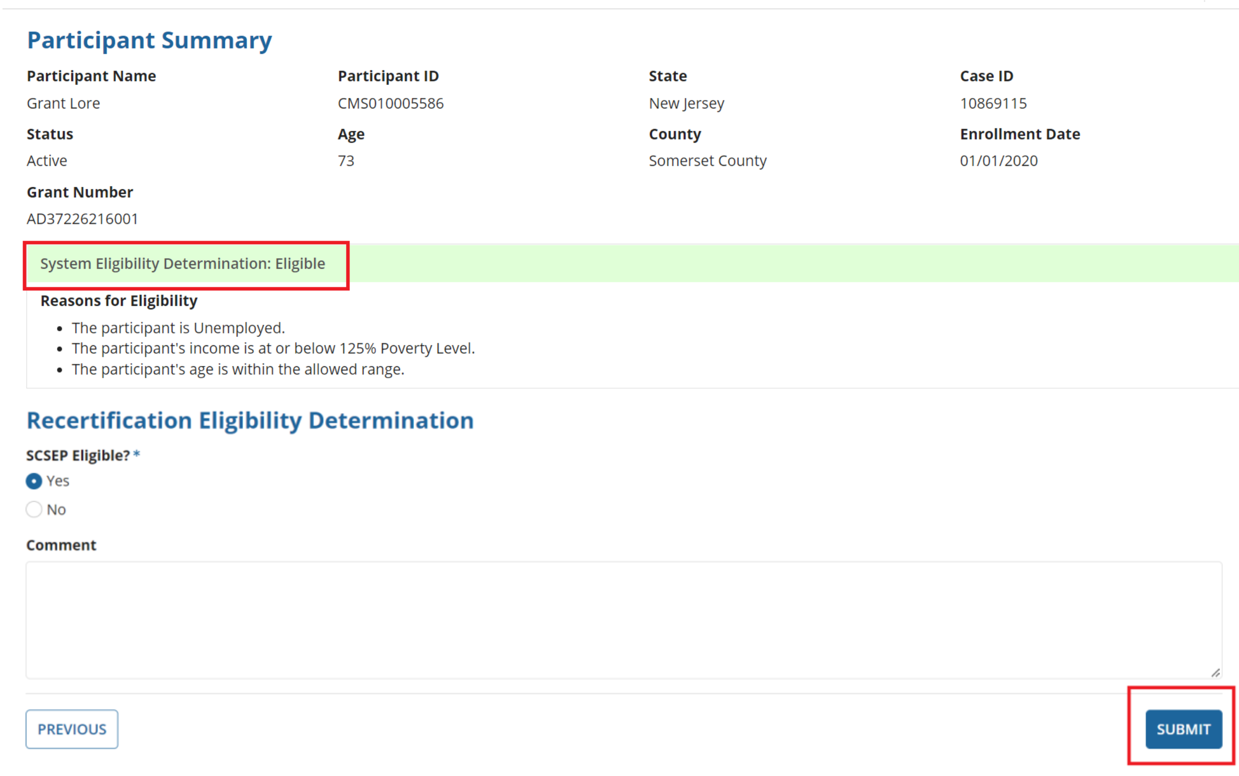
NO selected:

a. Select at least one checkbox under **Reason for Ineligibility** and an **Action Taken if Ineligible** and leave an explanation in the **Comment** field.

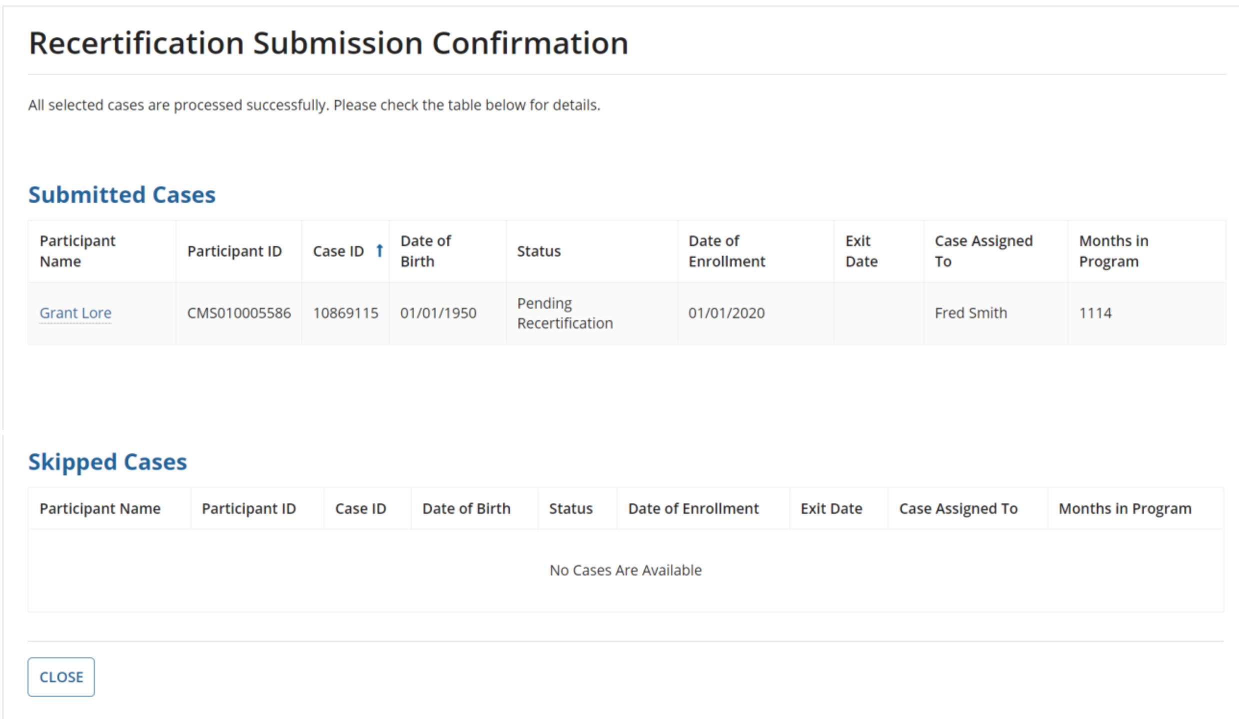
YES selected:

a. Space is provided to add optional **Comment**.
b. Click **SUBMIT** to proceed.





Upon clicking **Submit**, **Recertification Submission Confirmation** page is displayed.



Recertification Submission Confirmation

All selected cases are processed successfully. Please check the table below for details.

Submitted Cases

Participant Name	Participant ID	Case ID	Date of Birth	Status	Date of Enrollment	Exit Date	Case Assigned To	Months in Program
Grant Lore	CMS010005586	10869115	01/01/1950	Pending Recertification	01/01/2020		Fred Smith	1114

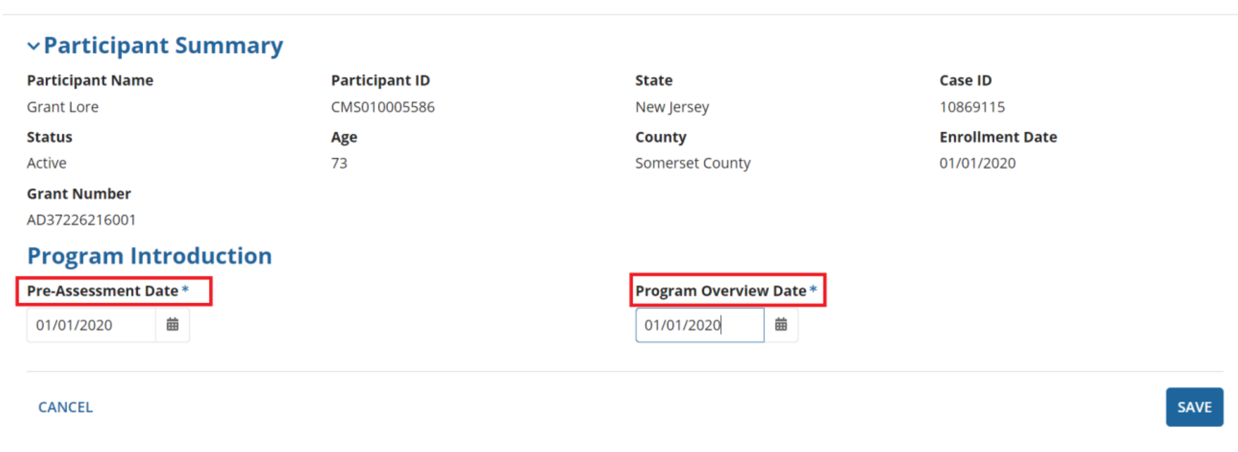
Skipped Cases

Participant Name	Participant ID	Case ID	Date of Birth	Status	Date of Enrollment	Exit Date	Case Assigned To	Months in Program
No Cases Are Available								

CLOSE

11. Manage Program Introduction

In this section Program Introduction is managed by editing the **Pre-Assessment Date** and **Program Overview Date.**



Participant Summary

Participant Name	Participant ID	State	Case ID
Grant Lore	CMS010005586	New Jersey	10869115
Status	**Age**	**County**	**Enrollment Date**
Active	73	Somerset County	01/01/2020
Grant Number			
AD37226216001			

Program Introduction

Pre-Assessment Date *

01/01/2020

Program Overview Date *

01/01/2020

CANCEL

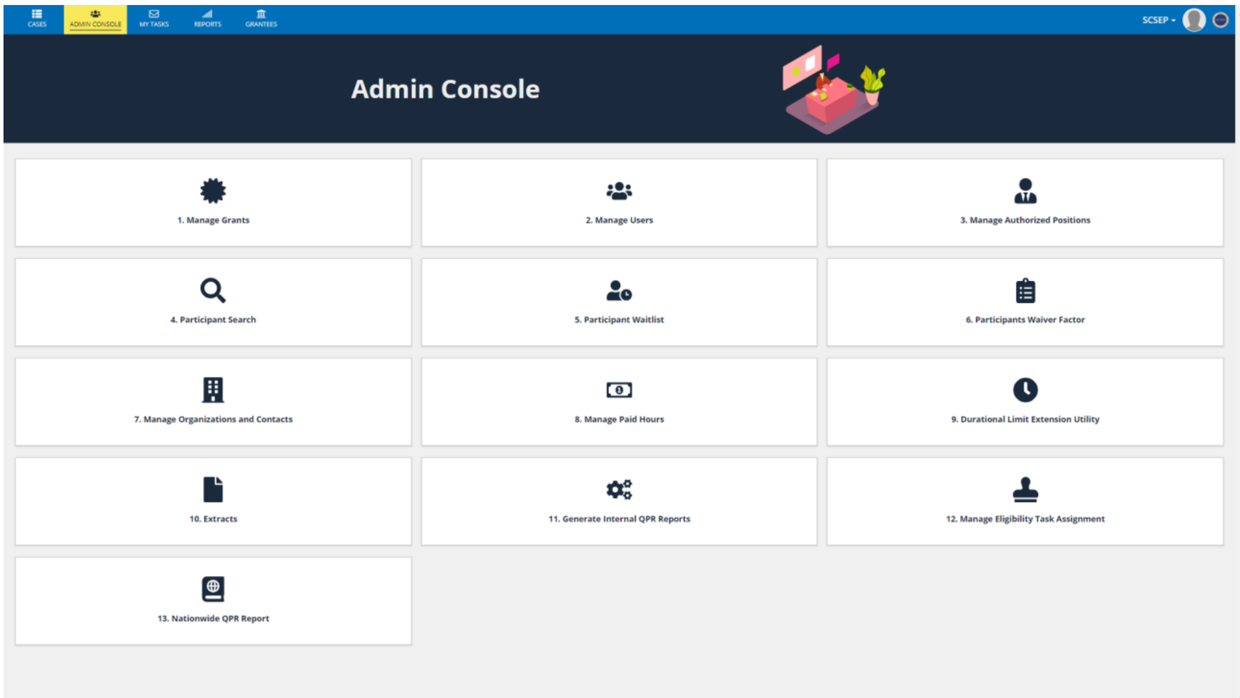
SAVE

Click **SAVE** to save the changes.

ADMIN CONSOLE

The **ADMIN CONSOLE** section is available for users to perform the administrative functions related to SCSEP. The functions that are available to each user on the Admin Console are role dependent.

ADMIN CONSOLE – Grantee Administrator



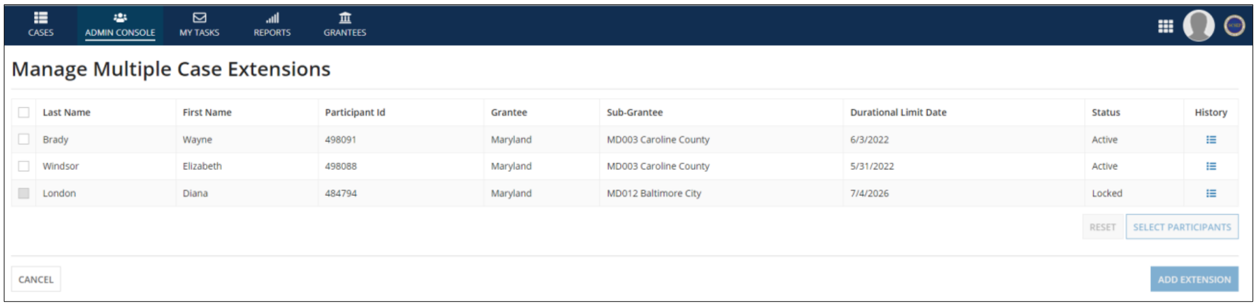
1. Durational Limit Extension Utility

Grantees whose individual durational limit (IDL) policy permits extensions for participants who are approaching their durational limit can use the Durational Limit Extension Utility to add extensions for those participants.

Only participants who qualify for an extension will be listed in the utility. Refer to the SCSEP Data Collection Handbook for information on determining qualification.

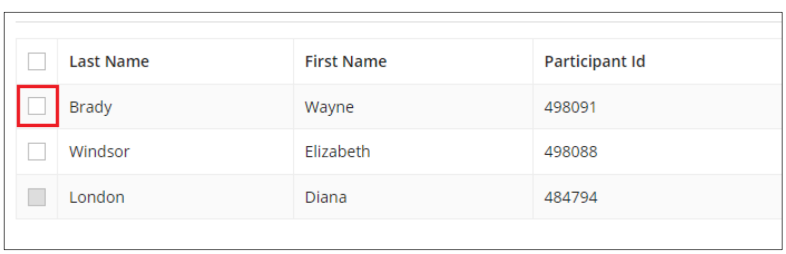
Participants who exceeded their durational limit and are now locked in the system will be listed in the utility but will need to have their records unlocked before an extension can be added.

Grantee Administrators can add an extension.

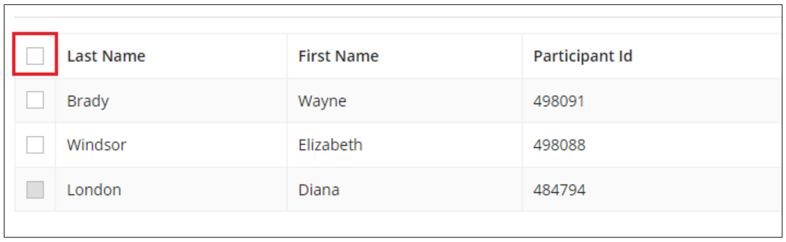


At any time, the button in the **History** column can be clicked for any participant to view their waiver factor information.

1. To add an extension for one or more participants, click the checkbox(es) to the left of the **Last Name**(s) of the participant(s).



To add an extension for all participants, click the checkbox to the left of the **Last Name** heading.

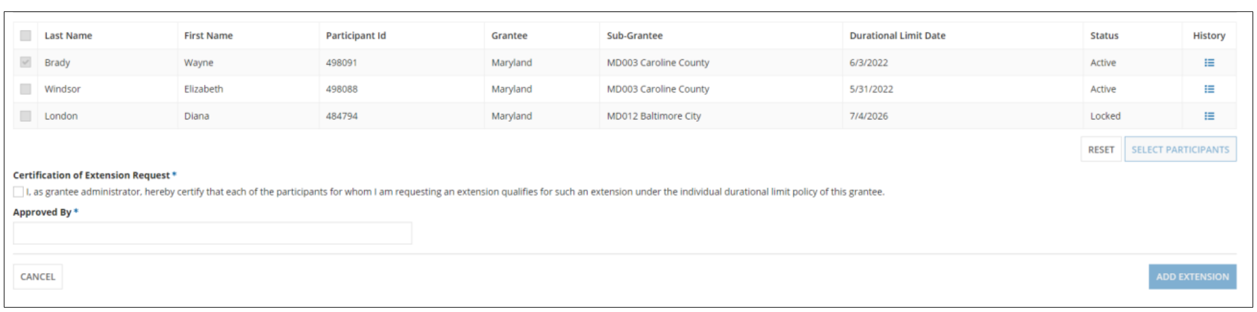


Note that the checkbox for participants who are locked is grayed out and cannot be checked.

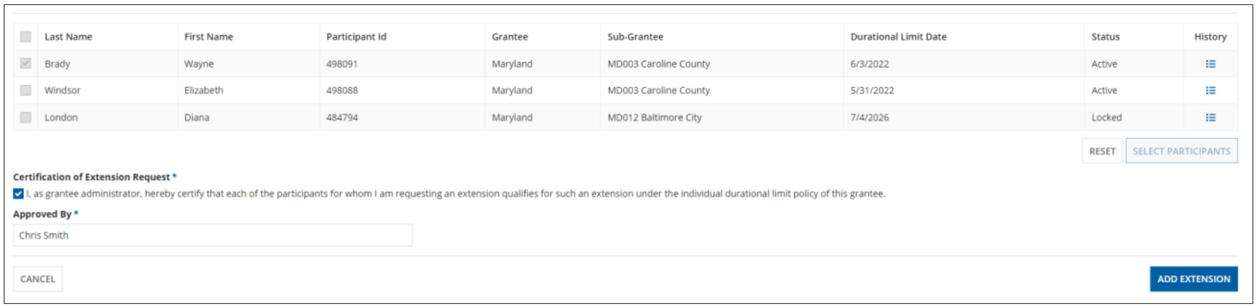
2. Click on one of the buttons on the screen to perform the next action.

Note that once at least one participant is selected, the **RESET** and **SELECT PARTICIPANTS** buttons are no longer grayed out and can be clicked.

- Click **RESET** to clear all checkboxes.
- Click **SELECT PARTICIPANTS** to show the Certification of Extension Request.
- Click **CANCEL** at any time to return to the previous screen. Note that information entered into the fields on the screen is not saved.



3. Check the **Certification of Extension Request** checkbox and enter the name of the approver.



	Last Name	First Name	Participant Id	Grantee	Sub-Grantee	Durational Limit Date	Status	History
	Brady	Wayne	498091	Maryland	MD003 Caroline County	6/3/2022	Active	
	Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	
	London	Diana	484794	Maryland	MD012 Baltimore City	7/4/2026	Locked	

RESET SELECT PARTICIPANTS

Certification of Extension Request *

I, as grantee administrator, hereby certify that each of the participants for whom I am requesting an extension qualifies for such an extension under the individual durational limit policy of this grantee.

Approved By *

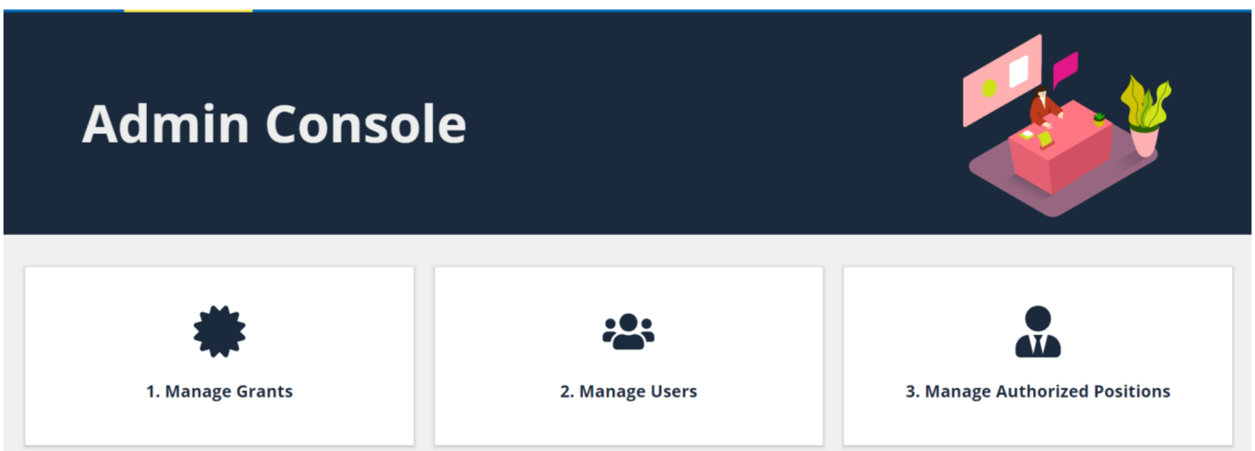
Chris Smith

CANCEL ADD EXTENSION

4. Once the **Certification of Extension Request** checkbox is checked and the name of the approver is entered, click **Enter** on the keyboard or click anywhere on the screen to activate the **ADD EXTENSION** button.

5. Click **ADD EXTENSION** button to add the extension.

Once clicked, the text **Action Completed** is displayed in a blue text box temporarily at the top of the screen and the user is returned to the previous screen.

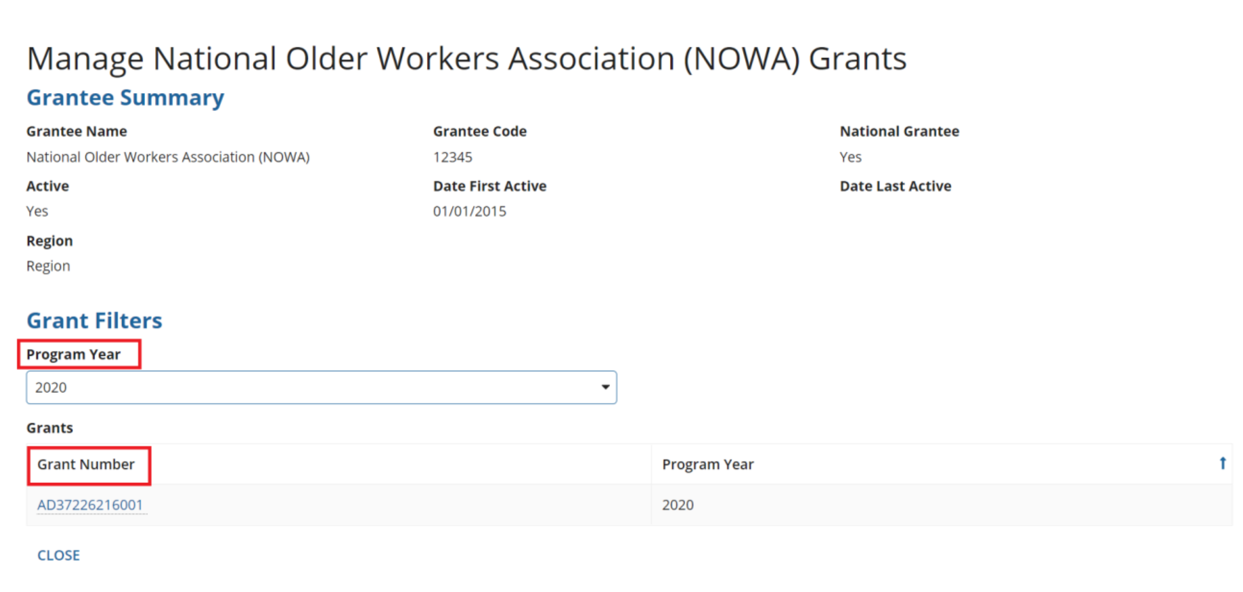


2. Manage Grants

Grantees can link sub-grantees to their grants using the Manage Grants utility. Once the grant is added to the system the grantee administrator can link which sub-grantees are associated with the grant. If a sub-grantee is no longer associated, the grantee administrator can unlink a sub-grantee from the grant.

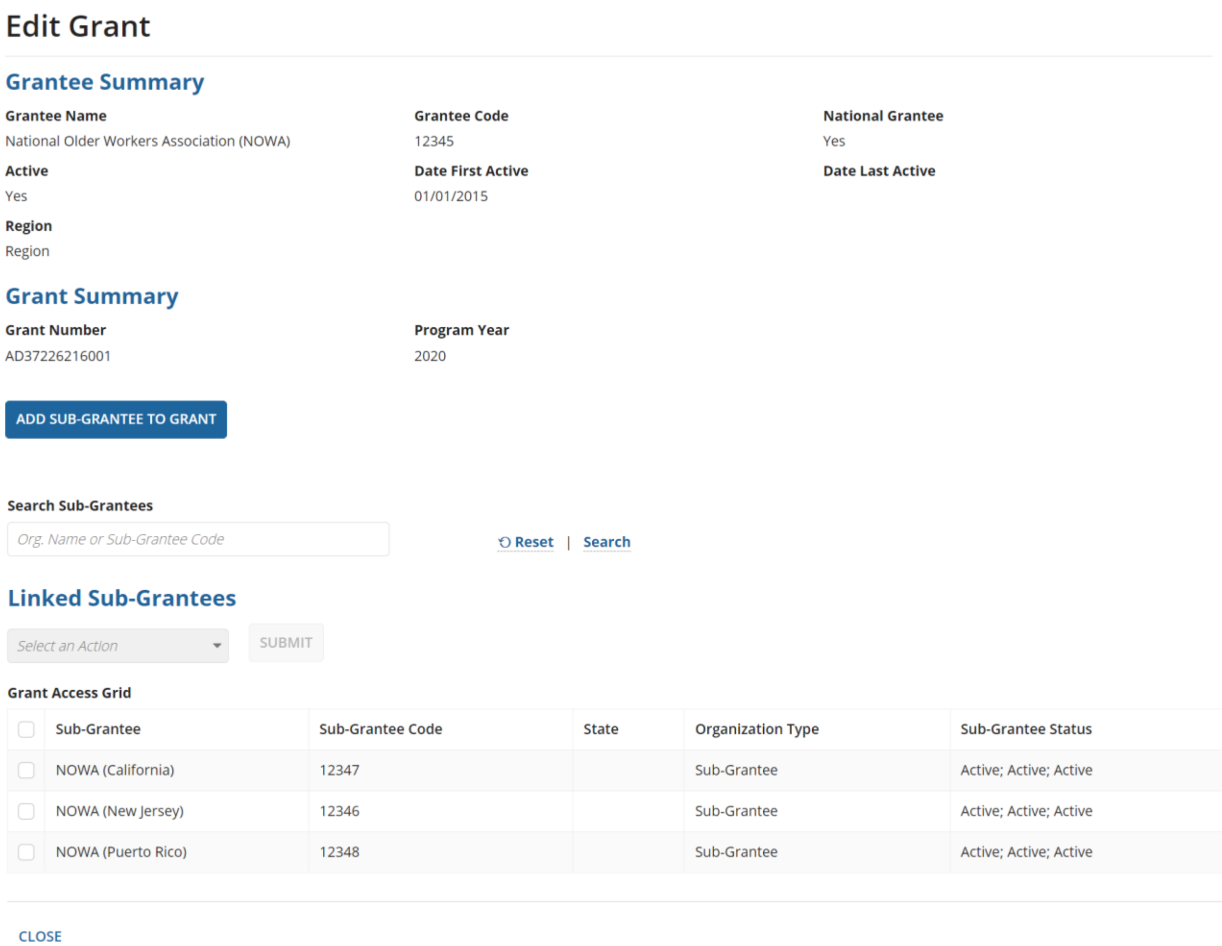
Manage Grants

1. To find the grant to update, select the program year associated with the grant in the **Program Year** dropdown.



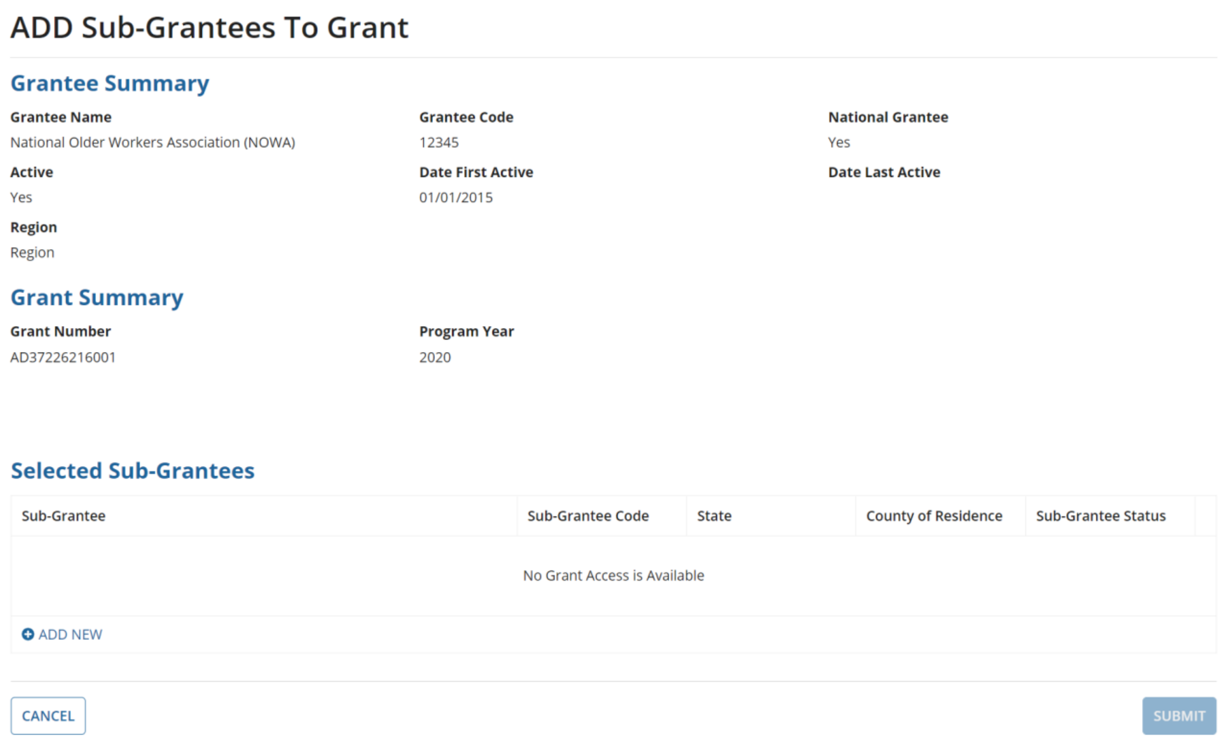
2. Click on the **Grant Number** hyperlink. The system navigates to the **Edit Grant** screen.

Sub-grantees currently linked to the selected grant are listed in the **Grant Access Grid**.

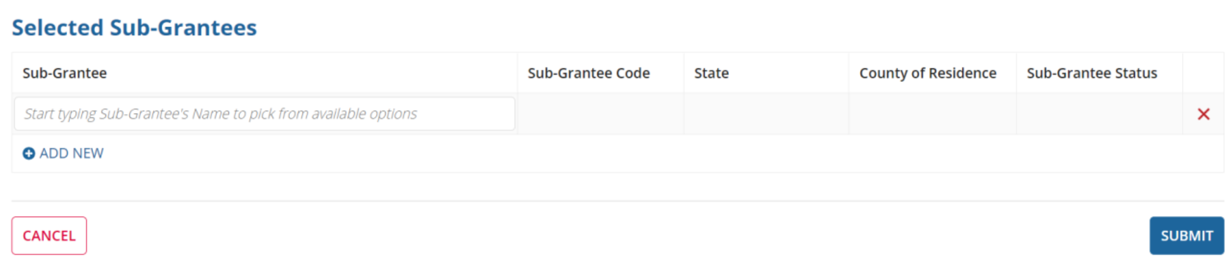


2.1 Associate Sub-Grantees to Grant

1. To link a sub-grantee not listed in the **Grant Access Grid**, click the **ADD SUB-GRANTEE TO GRANT** button. The system navigates to the **ADD Sub-Grantees to Grant** screen.

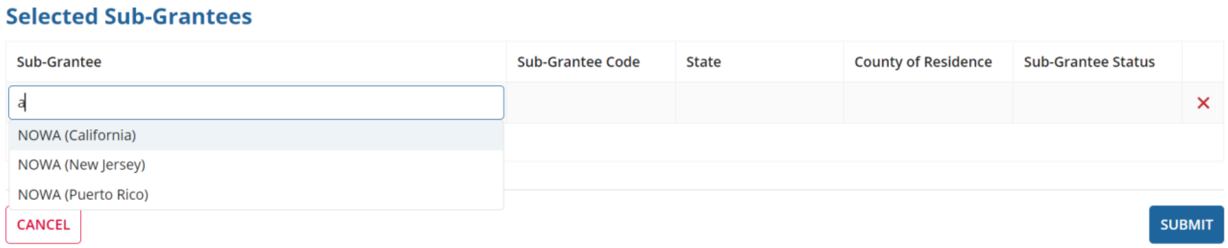


2. To search for a sub-grantee not currently linked, click the **ADD NEW** link under the **Selected Sub-Grantees** grid. A search box is displayed under the **Sub-Grantee** heading in the grid.

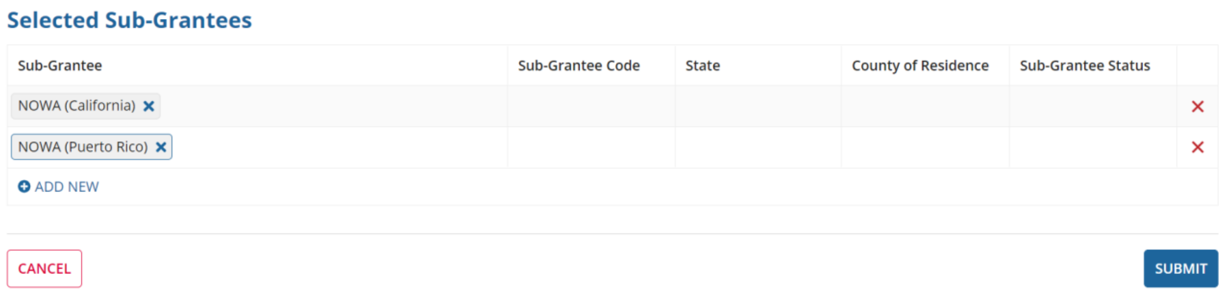


3. Enter a value in the search box to display a list of Sub-Grantees.

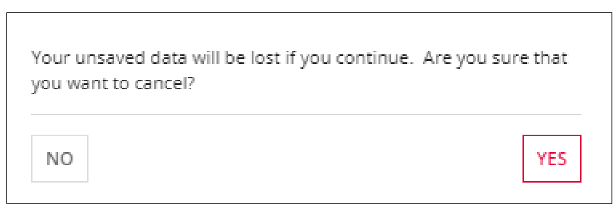
Note that a partial search term can be entered. All sub-grantees that contain the search term entered will be listed.



4. Continue to click on the **ADD NEW** link to add additional sub-grantees to link.



5. Click on one of the buttons on the screen to perform the next action.
   - Red **X** on the right-hand side of the grid removes the sub-grantee from the list.
   - **CANCEL** opens a pop-up window to confirm the cancellation.
     - Click **NO** to return to the screen.
     - Click **YES** to end linking the sub-grantee(s) and return to the previous screen.



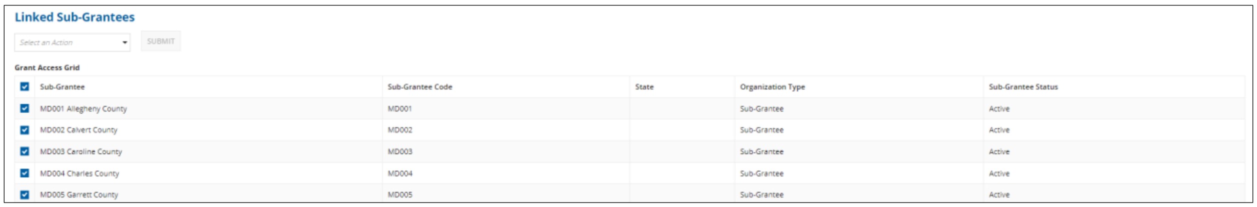
   - **SUBMIT** links the added sub-grantee(s) and returns to the previous screen. The sub-grantee(s) is listed in the **Grant Access Grid** on the screen.

2.2 Remove Sub-Grantees from Grant

1. To remove a sub-grantee(s) associated with a grant, check the checkbox(es) to the left of the name of the sub-grantee(s) in the **Grant Access Grid**.

Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
MD001 Allegheny County	MD001		Sub-Grantee	Active
MD002 Calvert County	MD002		Sub-Grantee	Active
MD003 Caroline County	MD003		Sub-Grantee	Active
MD004 Charles County	MD004		Sub-Grantee	Active
MD005 Garrett County	MD005		Sub-Grantee	Active
MD007 Queen Anne's County	MD007		Sub-Grantee	Active
MD008 St. Mary's County	MD008		Sub-Grantee	Active
MD009 Talbot County	MD009		Sub-Grantee	Active
MD010 Washington County	MD010		Sub-Grantee	Active

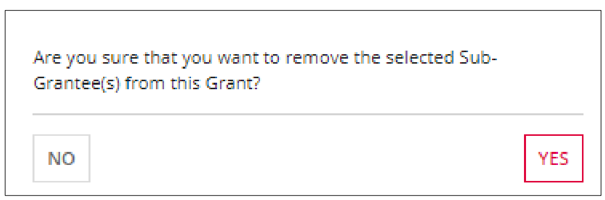
To remove all sub-grantees, click the checkbox to the left of the **Sub-Grantee** heading.



Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
MD001 Allegheny County	MD001		Sub-Grantee	Active
MD002 Calvert County	MD002		Sub-Grantee	Active
MD003 Caroline County	MD003		Sub-Grantee	Active
MD004 Charles County	MD004		Sub-Grantee	Active
MD005 Garrett County	MD005		Sub-Grantee	Active

2. Under the **Linked Sub-Grantees** subheading, click the arrow on the **Select an Action** dropdown.
3. Select **Remove from Grant**. The **SUBMIT** button is no longer grayed out and can be clicked.
4. Click **SUBMIT**. A pop-up window opens to confirm submission.

- Click **NO** to return to the screen. No sub-grantee(s) will be removed.
- Click **YES** to remove the selected sub-grantee(s).

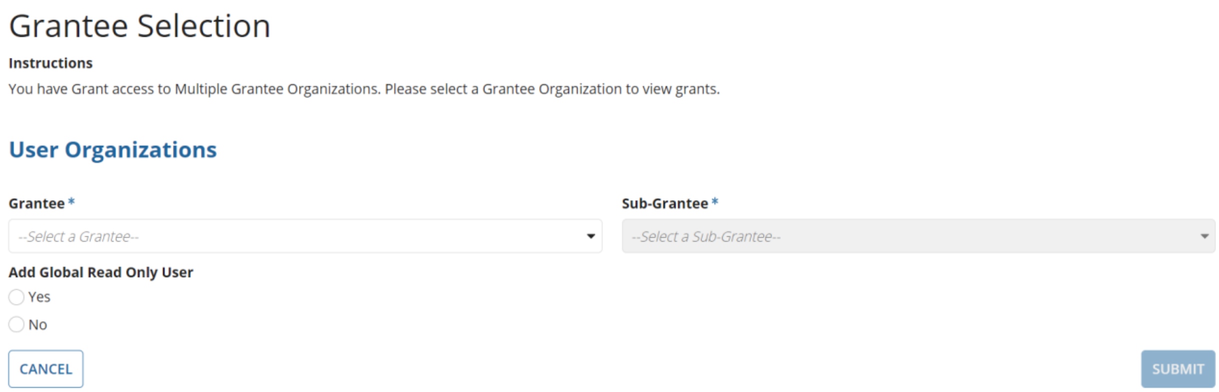


3. Manage Users

This section covers user management for Sub-Grantees.

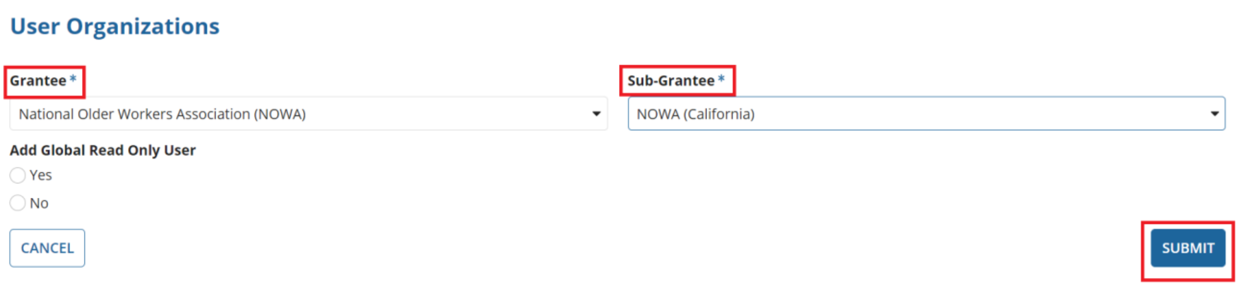
1. Add User
2. Update User
3. Add Read Only User

Manage Users

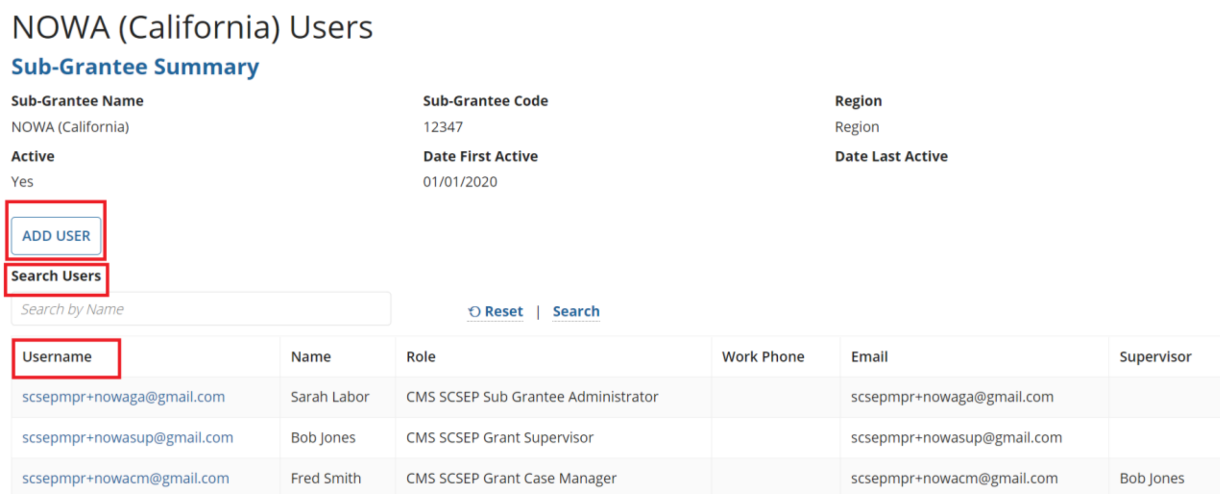


3.1 Add User

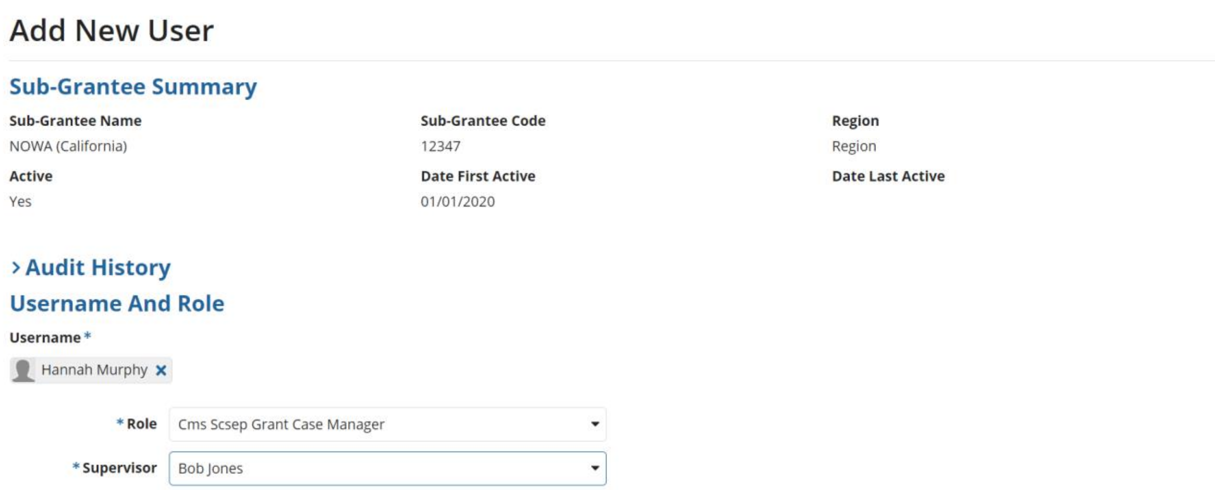
1. To add users, select **Grantee, Sub-Grantee**, and click **Submit**.

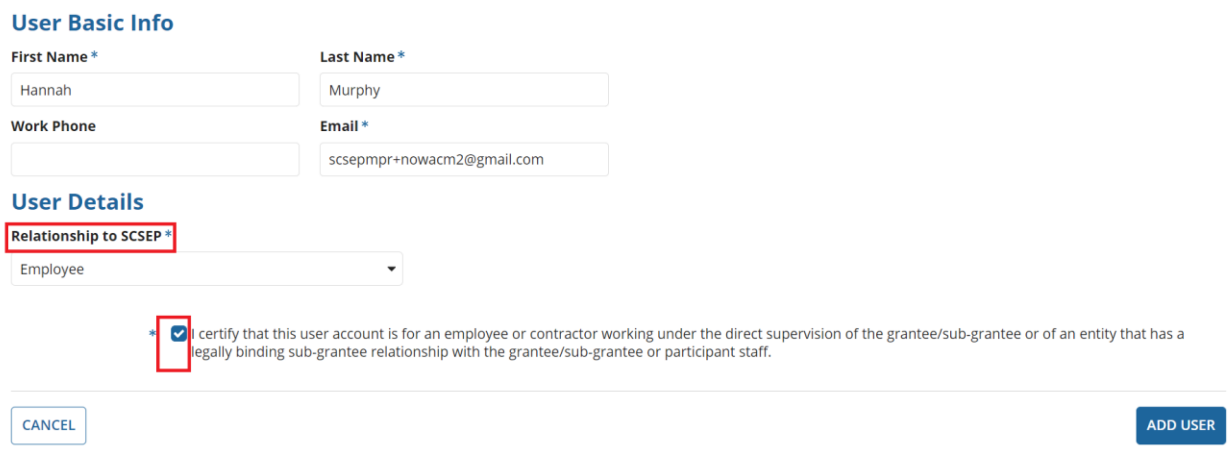


2. Upon clicking **Submit**, the user management page is displayed.
3. Click **ADD USER**.



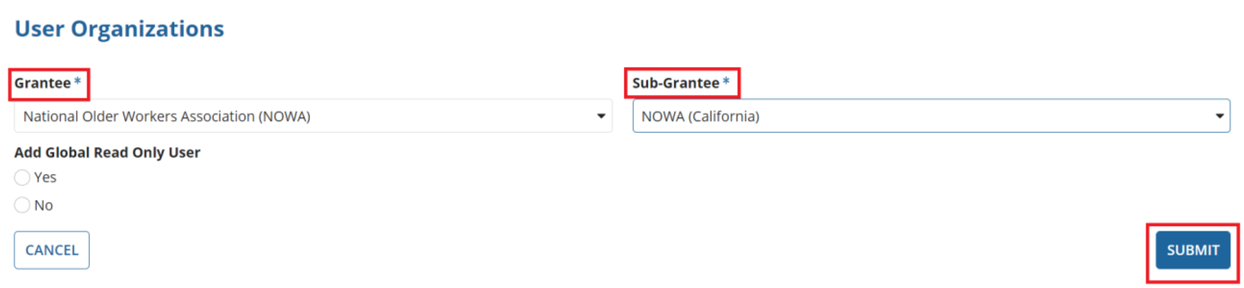
4. Enter a value in the **Username And Role** field to choose from the displayed list of Users.
5. Select **Role** from the drop down.
6. If **Supervisor** field is shown select a value from the drop down.
7. Select a value for **Relationship to SCSEP**.
8. Acknowledge the agreement and click **ADD USER** to add the selected user to the Sub-Grantee



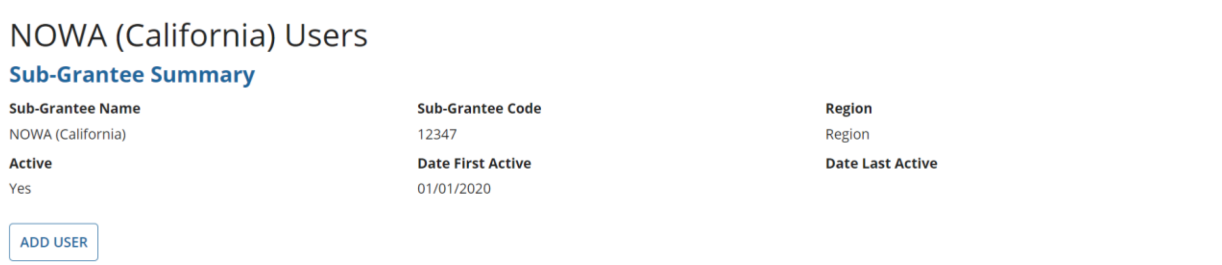


3.2 Update User

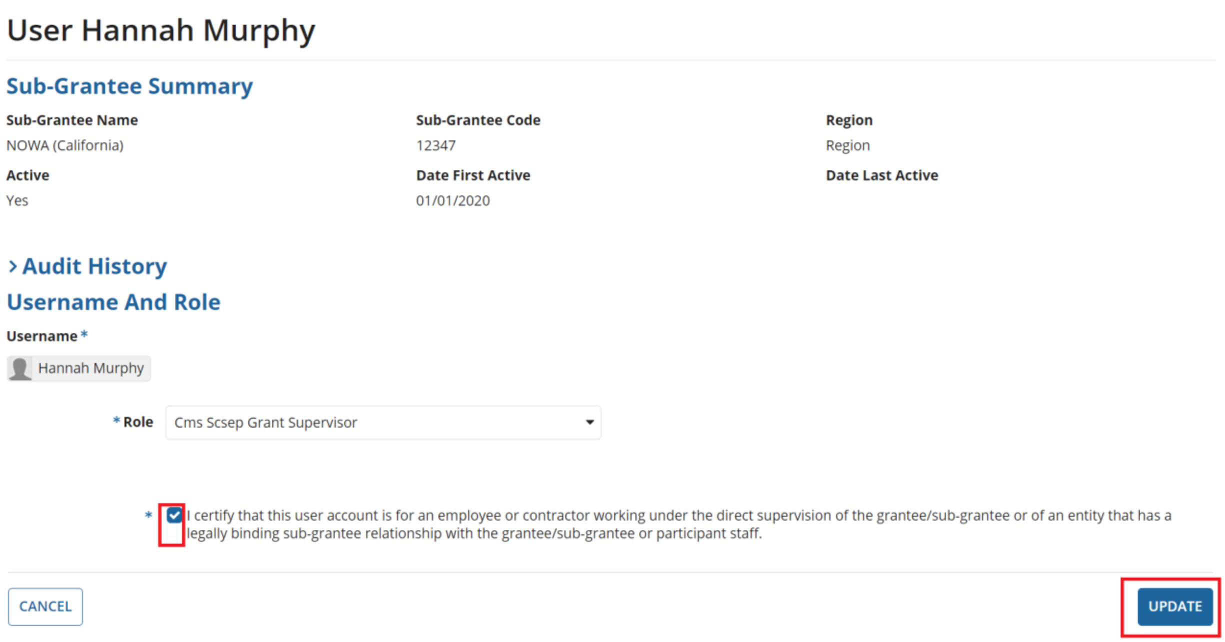
1. To update users, select **Grantee, Sub-Grantee**, and click **SUBMIT**.



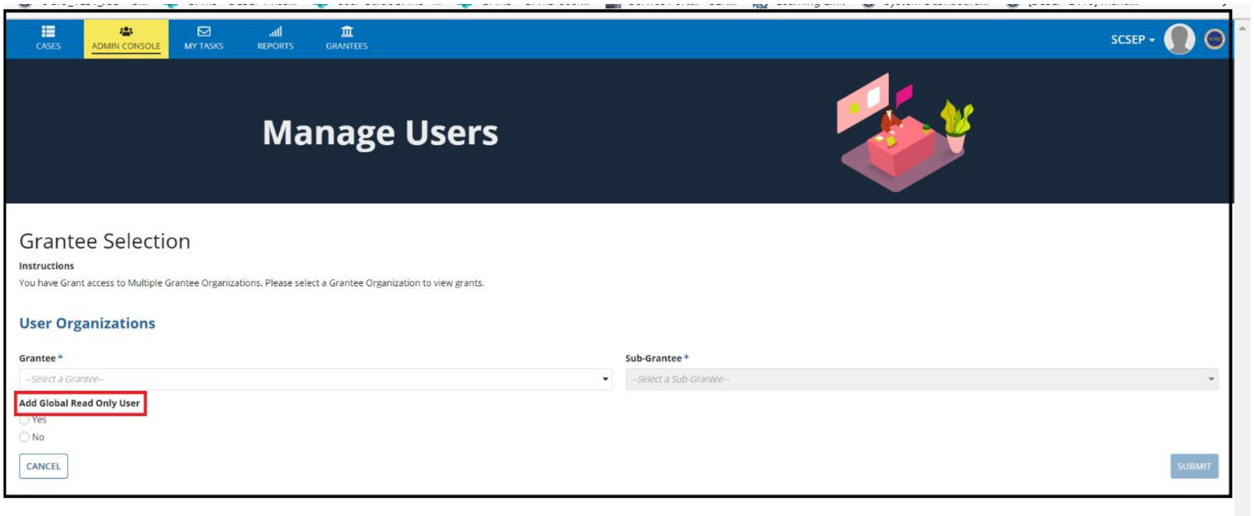
2. To update a user, select a user from the **Username** column from the displayed list.

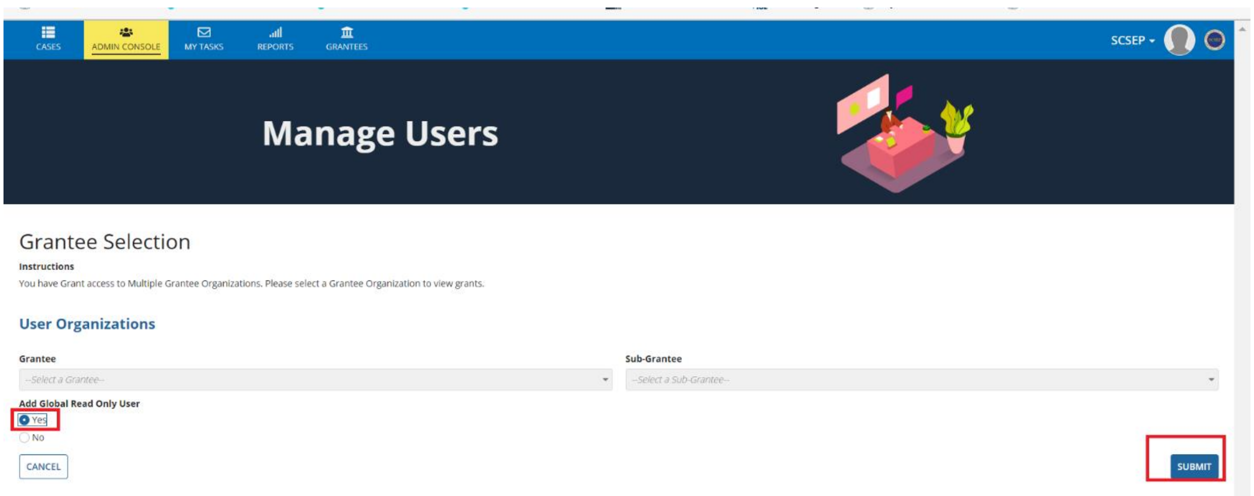


3. Update appropriate field values, Acknowledge the agreement.
4. Select a value for **Relationship to SCSEP**.
5. Click **UPDATE** to update the user.

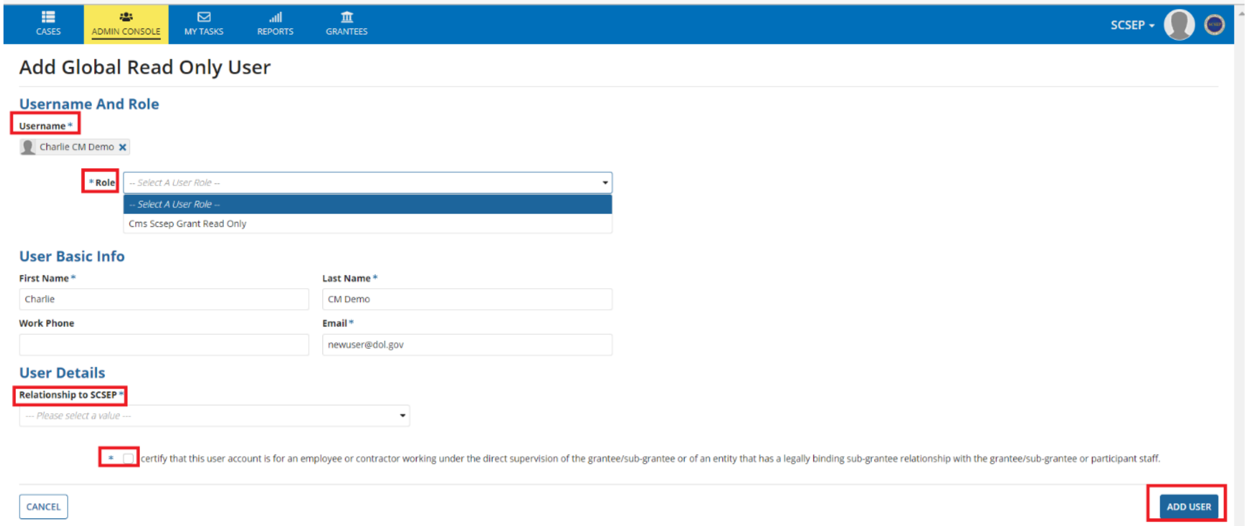


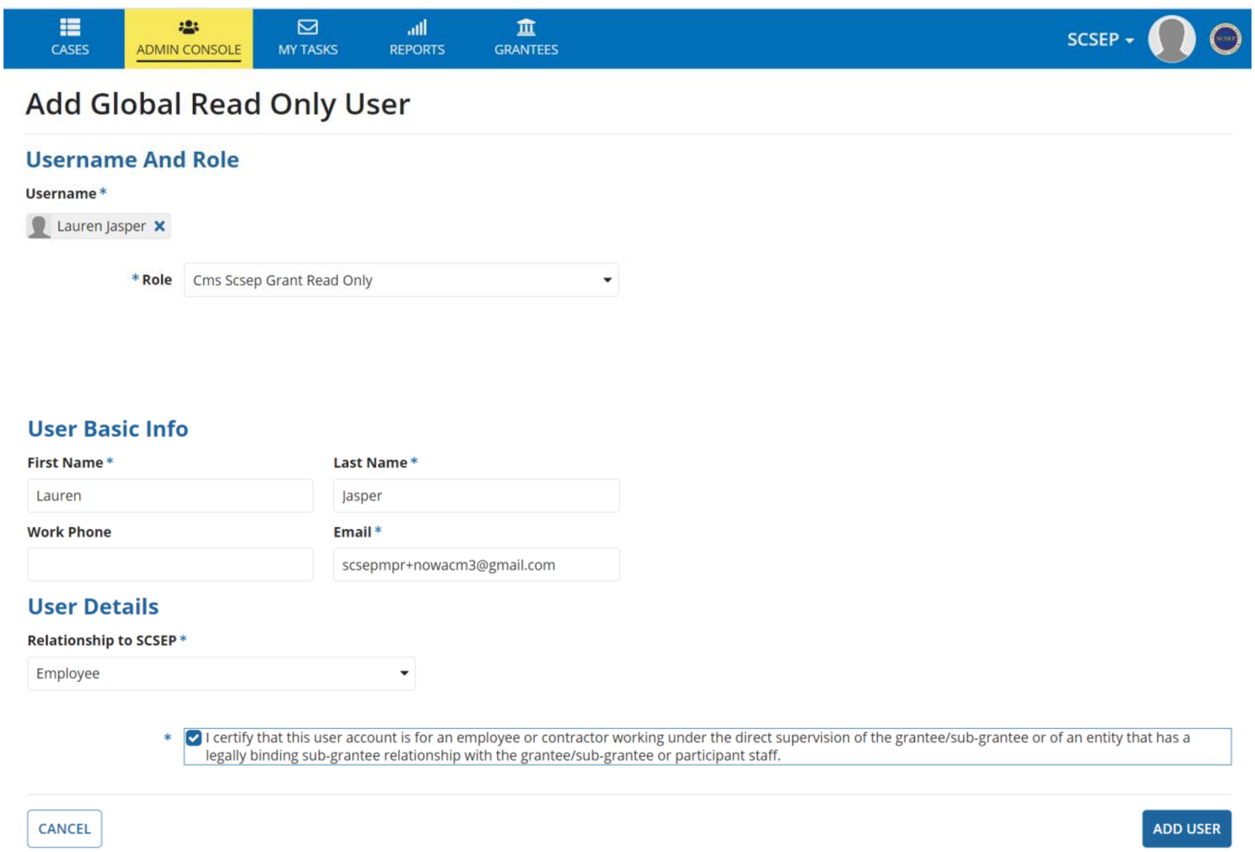
3.3 Add Read Only User





1. To add a Read Only Global user, click **Yes** for **Add Global Read Only User** and Click **Submit**
2. Enter a value in the **Username** field to choose from the displayed list of Users.
3. Select **Role** from the drop down.
4. Update appropriate field values.
5. Select a value for **Relationship to SCSEP**.
6. Acknowledge the agreement and click **ADD USER** to add the selected user to the Sub-Grantee
7. Click Add User





8. Action Completed message is displayed

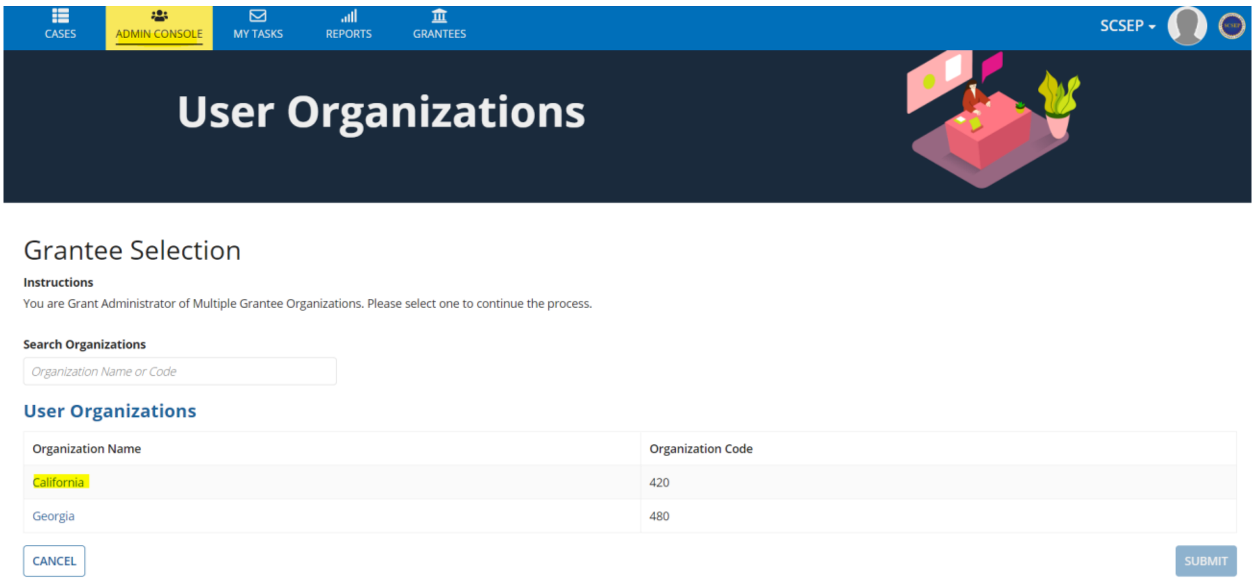
Note: To add **Read Only Restricted** user, follow same steps to add any other user role in the system.

4. Manage Authorized Positions

The **Manage Authorized Positions** page allows users to allocate positions within a county to one or many sub-grantees. If you have multiple grantees associated with your user account, you will first need to select the grantee from a table of User Organizations. You can identify the organization by using **the text search box below the instructions** or by locating the grantee organization in **the table below the text search box** and clicking the radio button. The following fields appear in this table:

- Organization Name: The name of the Grantee organization
- Organization Code: The grantee code

The blue button on the lower right of the screen labeled **SUBMIT** will not be clickable until a grantee organization has been selected.



Click the linked Organization Name (Grantee name)

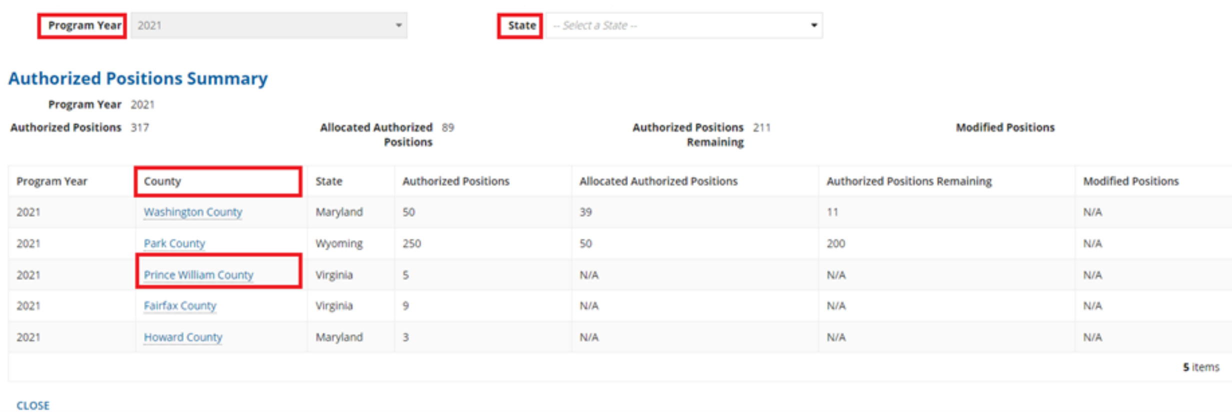
Two dropdown fields appear below the main title:

- **Program Year** – Displays the years between the current program year and 2016
- **State** – Displays any states associated with the grantee.

Below the dropdown fields is a summary of authorized position information for the selected program year. The following fields appear in the summary:

- **Program Year** – Displays the year selected.
- **Authorized Positions** – Displays the total number of authorized positions.
- **Allocated Authorized Positions** – Displays the total number of authorized positions allocated to a subgrantee.

- **Authorized Positions Remaining** – Displays the total number of authorized positions that have not been allocated to a sub-grantee.
- **Modified Positions** – Displays the total number of modified positions for the grantee.



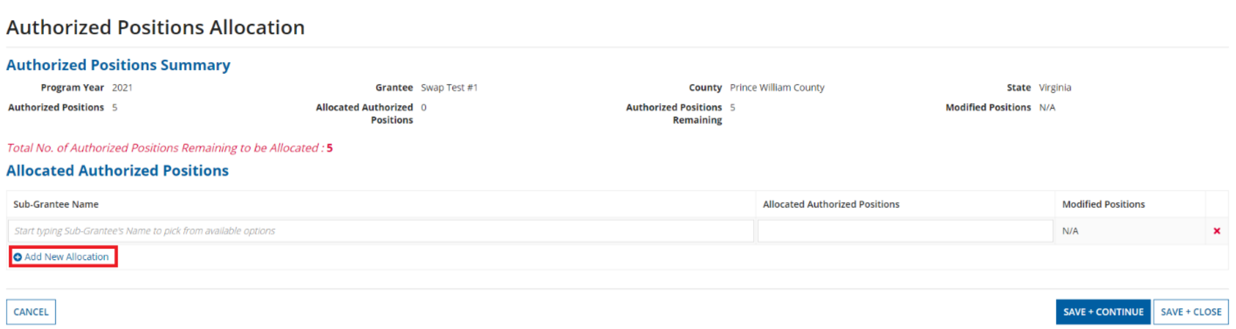
Program Year	County	State	Authorized Positions	Allocated Authorized Positions	Authorized Positions Remaining	Modified Positions
2021	Washington County	Maryland	50	39	11	N/A
2021	Park County	Wyoming	250	50	200	N/A
2021	Prince William County	Virginia	5	N/A	N/A	N/A
2021	Fairfax County	Virginia	9	N/A	N/A	N/A
2021	Howard County	Maryland	3	N/A	N/A	N/A

The authorized position information for each county associated with the selected state appears in a table below the **Authorized Position Summary**. The following fields appear in the table:

- **Program Year** – Displays the year selected.
- **County** – Displays the name of the county as hyperlinked text.
- **State** – Displays the state associated with the county
- **Authorized Positions** – Displays the number of authorized positions associated with the county.
- **Allocated Authorized Positions** – Displays the number of authorized positions associated with the county that have been allocated.
- **Authorized Positions Remaining** – Displays the number of authorized positions associated with the county that have not been allocated.
- **Modified Positions** – Displays the number of modified positions associated with the county.

When a user clicks the **hyperlinked county text**, the user is redirected to the **Authorized Position Allocation** page. A summary is displayed below the title on the page. The following fields are included in the summary:

- **Program Year** – Displays the year selected
- **Grantee** – Displays the Grantee Name
- **County** – Displays the County name selected
- **State** – Displays the State selected
- **Authorized Positions** – Displays the number of authorized positions associated with the county.
- **Allocated Authorized Positions** – Displays the number of authorized positions associated with the county that have been allocated.
- **Authorized Positions Remaining** – Displays the number of authorized positions associated with the county that have not been allocated.
- **Modified Positions** – Displays the number of modified positions associated with the county.



Below the summary, a table presents the allocated positions and includes the following columns:

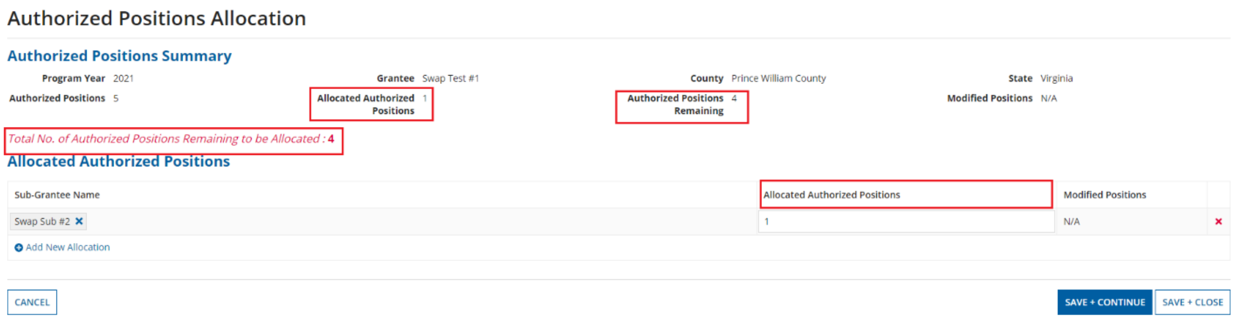
- **Sub-Grantee Name** – A text search box that allows you to locate a sub-grantee associated with the grantee.
- **Allocated Authorized Positions** – A text box for entering an integer value.
- **Modified Positions** – A text box that displays the modified positions.

A user must click the **Add New Allocation** link below the **Allocated** positions table to allocate positions to a new sub-grantee. When clicked, a row will be added to the table where a user can locate a sub-grantee using the text search box in the **Sub-Grantee Name** field.

The following text appears above the table heading:

Total No. of Authorized Positions Remaining to be Allocated: X

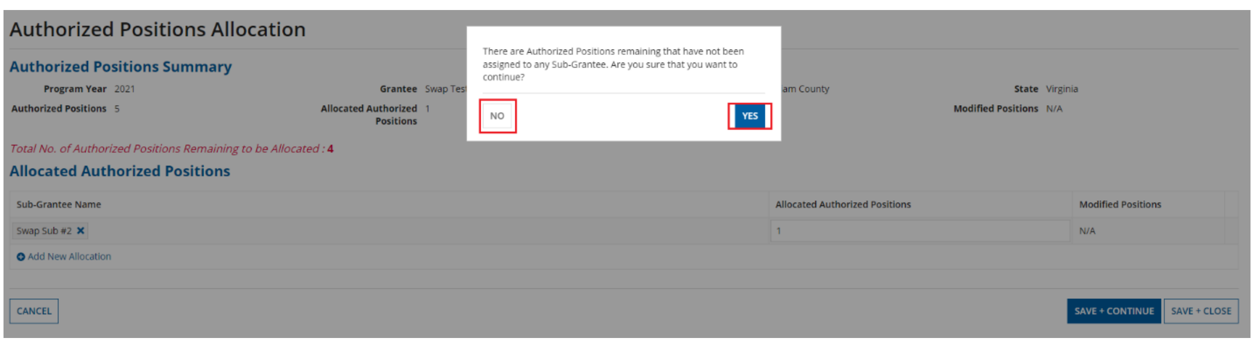
X equals the Authorized positions minus the sum of allocated authorized positions for all sub-grantees. If the sum of the allocated authorized positions equals the authorized positions for the county, the text will be green. If the sum of the allocated authorized positions is less than the authorized positions, the text will appear red.



If the user tries to save the record by clicking either **SAVE+CONTINUE** or **SAVE+CLOSE**, a dialog box with the following text appears:

> There are Authorized Positions remaining that have not been assigned to any Sub-Grantee. Are you sure that you want to continue?

If the user selects **YES**, the record will be saved, and the user will be redirected to the Authorized Position by County page. If the user selects **NO**, the record will not be saved, and the user will return to the **Authorized Positions Allocation** page.



If the sum of the allocated authorized positions is greater than the authorized positions, the text will appear blue, and the following message appears in red font with a red background on the bottom of the screen:

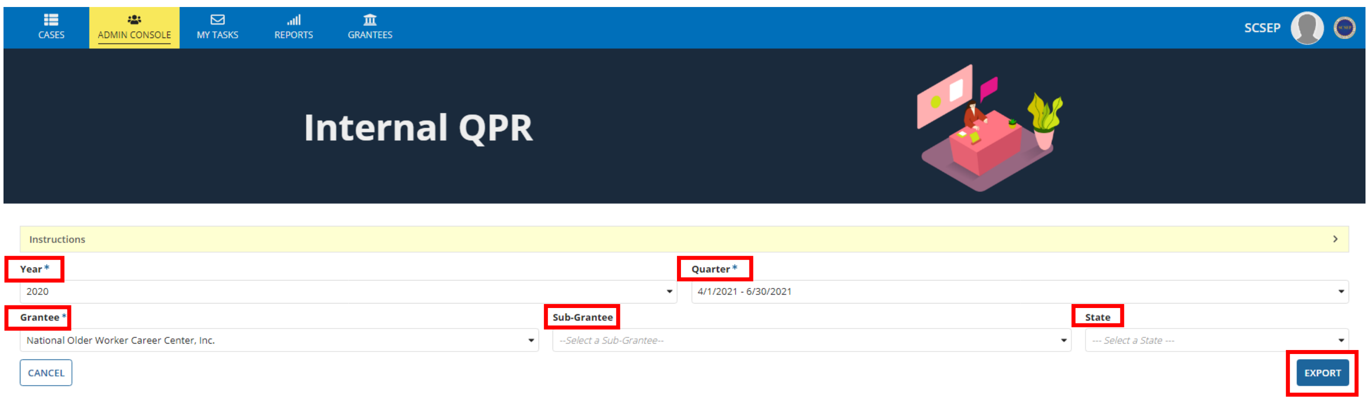
> The total authorized positions for this county exceed the authorized positions for the county. The current total of sub-grantee Authorized Positions (APs) exceeds the number of APs allocated for this grantee.

6. Generate Internal QPR Reports

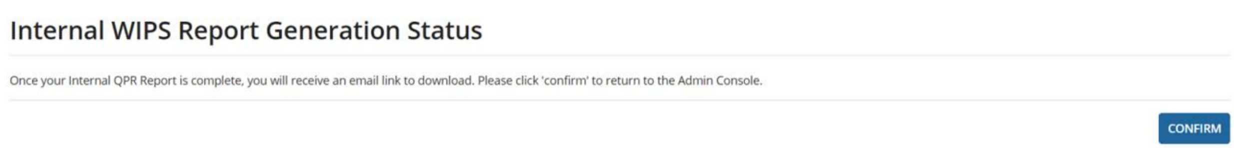
The **Generate Internal QPR Reports** page allows sub-grantee administrators, grantee administrators and Program Analysts to generate an internal Quarterly Progress Report. The following instructions display below the banner in an expandable note: Please select a reporting quarter and grantee in order to generate the internal QPR.

The following dropdown fields display below the expandable note:

- **Year** (Required) – Displays all years between 2016 and the current program year. This field defaults to the current program year.
- **Quarter** (Required) – Displays the start and end date of each quarter available for the selected program year. This field defaults to the current quarter.
- **Grantee** (Required) – Displays all grantees associated with the user.
- **Sub-Grantee** – Displays all sub-grantees associated with the selected grantee.
- **State** – Displays all states.



Below the dropdown values is a blue button labeled **EXPORT**. When the user selects the required fields and clicks **EXPORT**, the user is redirected to the Internal WIPS Report Generation Status page. On this page, the status CONFIRM button is displayed.:



Click the CONFIRM button.

The user is returned to the ADMIN CONSOLE page. When the QPR is generated, the user will receive an email with a link to retrieve the QPR.

Hello,

Your Internal QPR Report is ready for download. Please click the link below to access the report.

PY 2023 Qtr 1 Performance Report for SCSEP

Request Date: 8/11/2023 3:10 PM EDT

Thank you.

Note: Please do not reply. This message has been sent by a notification only system. The link will expire after 5 hours.

Click the link in the email. The sign in page is returned and the user has to sign in to the application again. The Report Confirmation page is displayed with a download icon.

Report Confirmation

SCSEP Internal Performance Status Report

Name	Size	Generated By	Generated Date	Download
SCSEP Performance Status Report: 08-11-2023 03:14:27	14.616 KB	[redacted]	8/11/2023 3:14 PM EDT	

CLOSE

Click the download icon. The QPR is downloaded. The user can open the downloaded file.

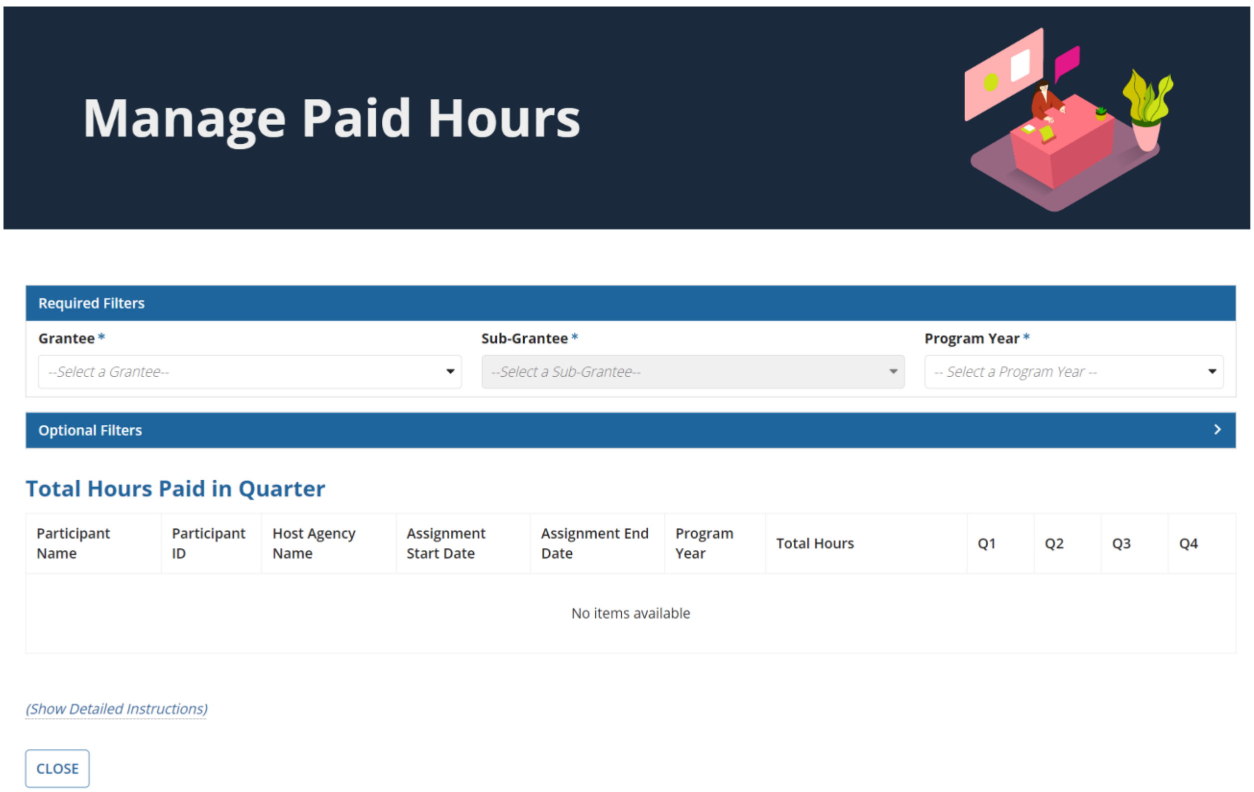
7. Manage Paid Hours

Users can update the hours for multiple participants through the **Manage Paid Hours** utility.

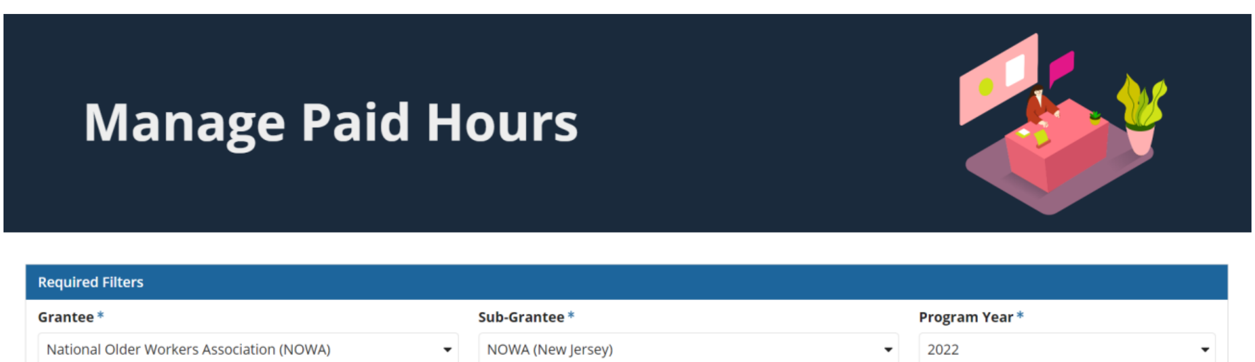
Once the user selects a program year that has not been frozen, all participants active within that program year are listed on the screen. The hours can be entered for the quarters in which a participant was active. Quarters in which a participant was not active, for example, when they are on break or have exited the program, will be grayed out, and hours for those quarters cannot be entered.

Once a program year has been frozen, the hours for that program can no longer be entered, but can be viewed through the utility.

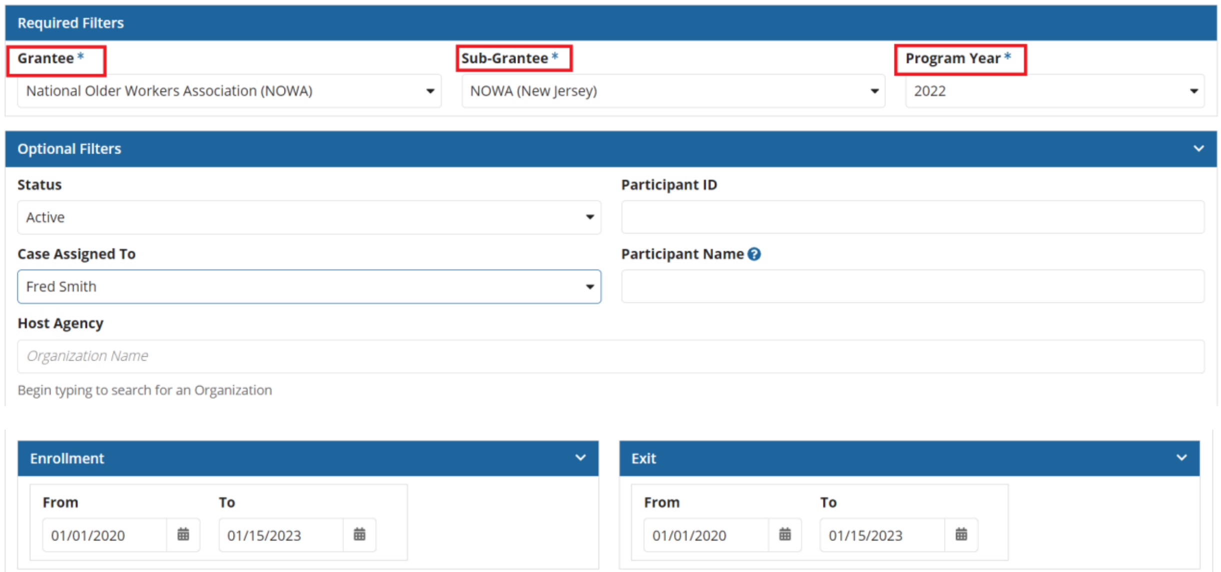
Refer to the **Data Collection Handbook** for definitions of each category of hours.



1. To enter hours for all active participants in a sub-grantee, select the **Grantee, Sub-grantee,** and **Program Year** in the dropdowns.



Note that the search can be further narrowed by using the **Optional Filters.**



2. Upon entering the above required values, the **Reset** and **Search** buttons become visible.
   - Click **Reset** to clear all selections and begin a new search.
   - Click **Search** to search for participants within the specified selections.

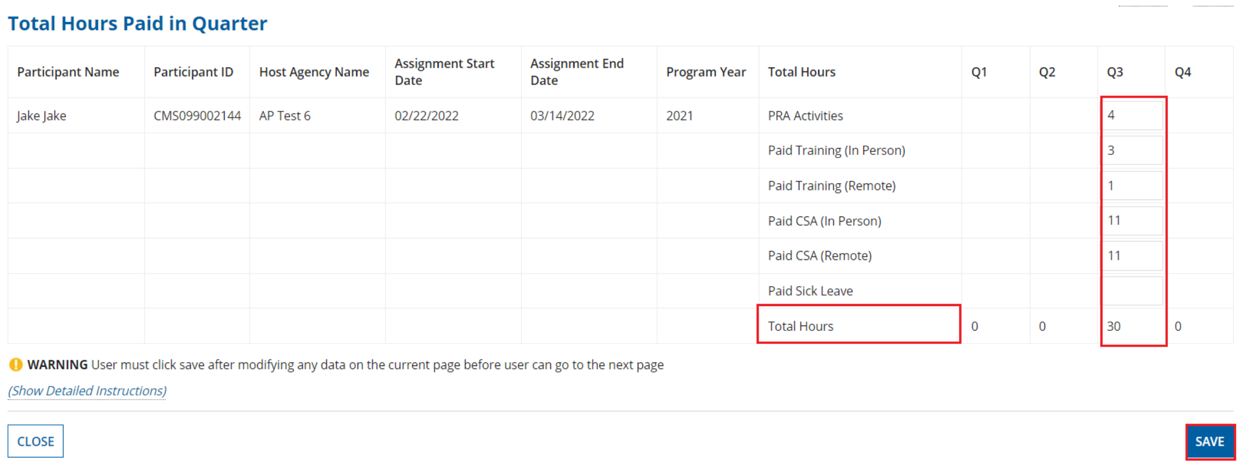
   Participants who meet the selection criteria will be displayed on the screen.

3. Enter the hours for each participant in the appropriate category.
   As hours are entered, the Total Hours row is updated with the total number of hours entered in the rows above for that participant.

4. If the **SAVE** button is grayed out and cannot be clicked, click anywhere on the screen to activate it.

5. Click **SAVE** to save the entered data.

Once **SAVE** is clicked, the user can navigate to additional screens of participants who meet the selection criteria and enter their hours.



Total Hours Paid in Quarter

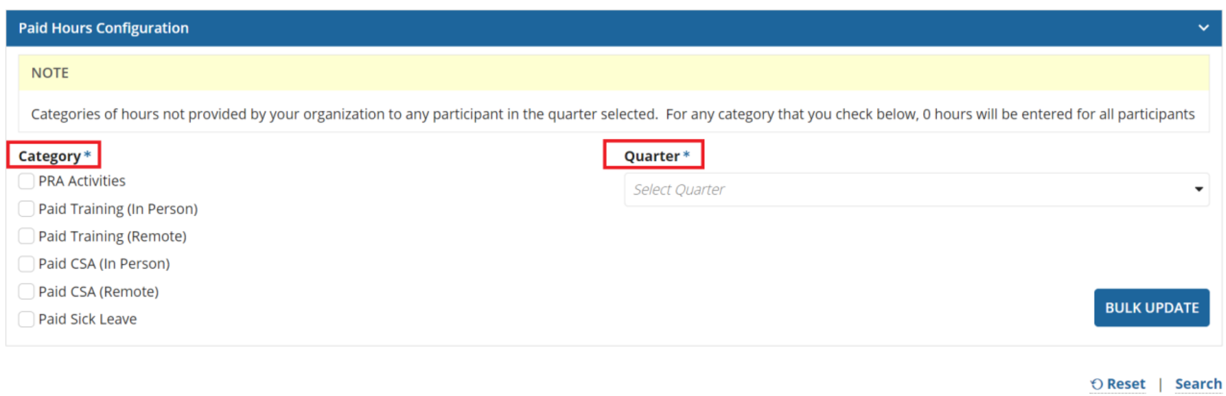
Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	Program Year	Total Hours	Q1	Q2	Q3	Q4
Jake Jake	CMS099002144	AP Test 6	02/22/2022	03/14/2022	2021	PRA Activities			4	
						Paid Training (In Person)			3	
						Paid Training (Remote)			1	
						Paid CSA (In Person)			11	
						Paid CSA (Remote)			11	
						Paid Sick Leave				
						Total Hours	0	0	30	0

WARNING User must click save after modifying any data on the current page before user can go to the next page

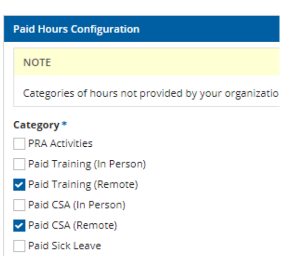
(Show Detailed Instructions)

CLOSE SAVE

If a category(s) of hours is not available for all participants, the Paid Hours Configuration can be used to add 0 hours to all participants for that category(s) for a selected quarter.



1. Click the category(s) of hours in the **Category** list.



2. Select the desired quarter in the dropdown.

3. Click **BULK UPDATE**. A pop-up window opens to confirm the update.

Paid Hours Update

Are you sure you want to enter zero for all records for the selected hour categories

NO YES

- Click **NO** to return to the screen.
- Click **YES** to update the selected category(s) and quarter with 0.

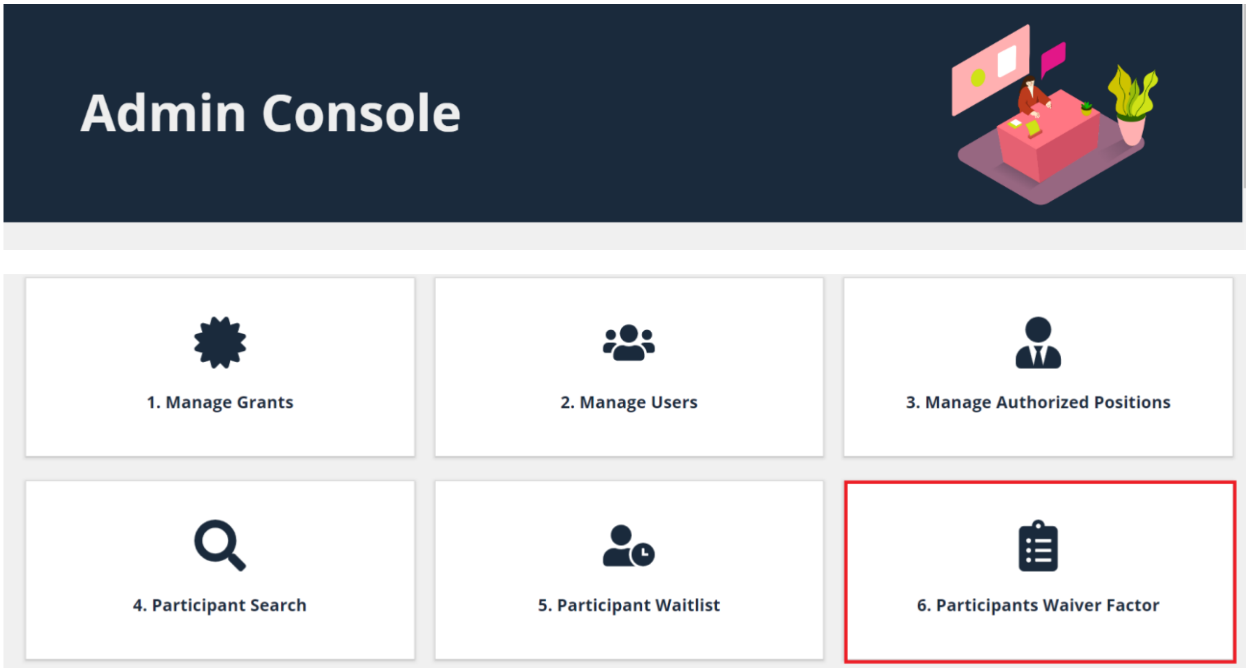
All hours fields for the selected category(s) and quarter will be set to 0.

Total Hours Paid in Quarter

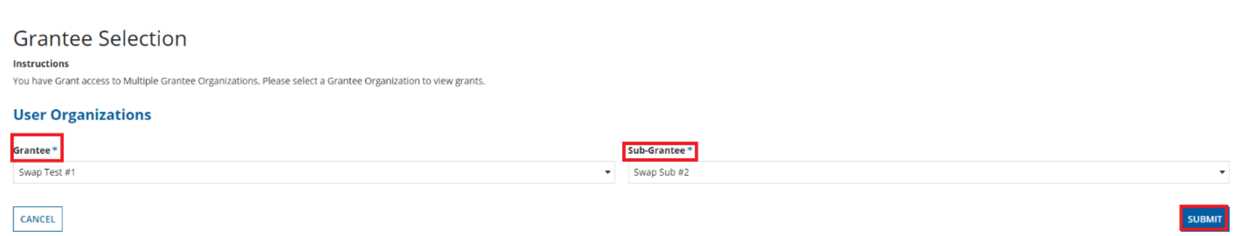
Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	Program Year	Total Hours	Q1	Q2	Q3	Q4
Wayne Brady	CMS000498091	Future Care	06/04/2017		2021	PRA Activities		0		0
						Paid Training (In Person)		0		
						Paid Training (Remote)		0	0	
						Paid CSA (In Person)		0		
						Paid CSA (Remote)		0	0	
						Paid Sick Leave		0		
						Total Hours	0	0	0	0
Elizabeth Windsor	CMS000498088	M & T Bank	06/01/2017		2021	PRA Activities		0		0
						Paid Training (In Person)		0		
						Paid Training (Remote)		0	0	
						Paid CSA (In Person)		0		
						Paid CSA (Remote)		0	0	
						Paid Sick Leave		0		
						Total Hours	0	0	0	0

8. Participants Waiver Factor

Participants Waiver Factor can be accessed and managed by selecting **Admin Console** and then **Participants Waiver Factor** in this section.



Once you select **Participants Waiver Factor**, a screen will appear called **Grantee Selection**. You will select a **Grantee** and **Sub-Grantee** from the dropdowns. Click **Submit** to view/edit Participant's waivers.



Once you click **Submit**, a list of participants who have existing waiver factors will be displayed.

Participants Waiver Factors

Program Year

2022

Participant Name	Program Year	Waiver Updated
Adrian Allweather	2022	✔
Belinda Chesterfield	2022	✔
Brenda Johnson	2022	✔
Caroline O'Dell	2022	✔
Charles Dexter-Ward	2022	✔
Deliah Derbyshire	2022	✔
Edward Murphy	2022	✔
Grant Lore	2022	✔

8 items

CLOSE

You will note that some participants have green check marks or red x marks under the **Waiver Updated** column. The green check mark indicates that this participant's waiver factors have been updated in their record and the red x indicates that the waivers have not been updated.

Click on a participant's name to edit the waiver factors for that participant. The participant's waiver factors for the selected program year appear below the participant results.

Participants Waiver Factors

Program Year

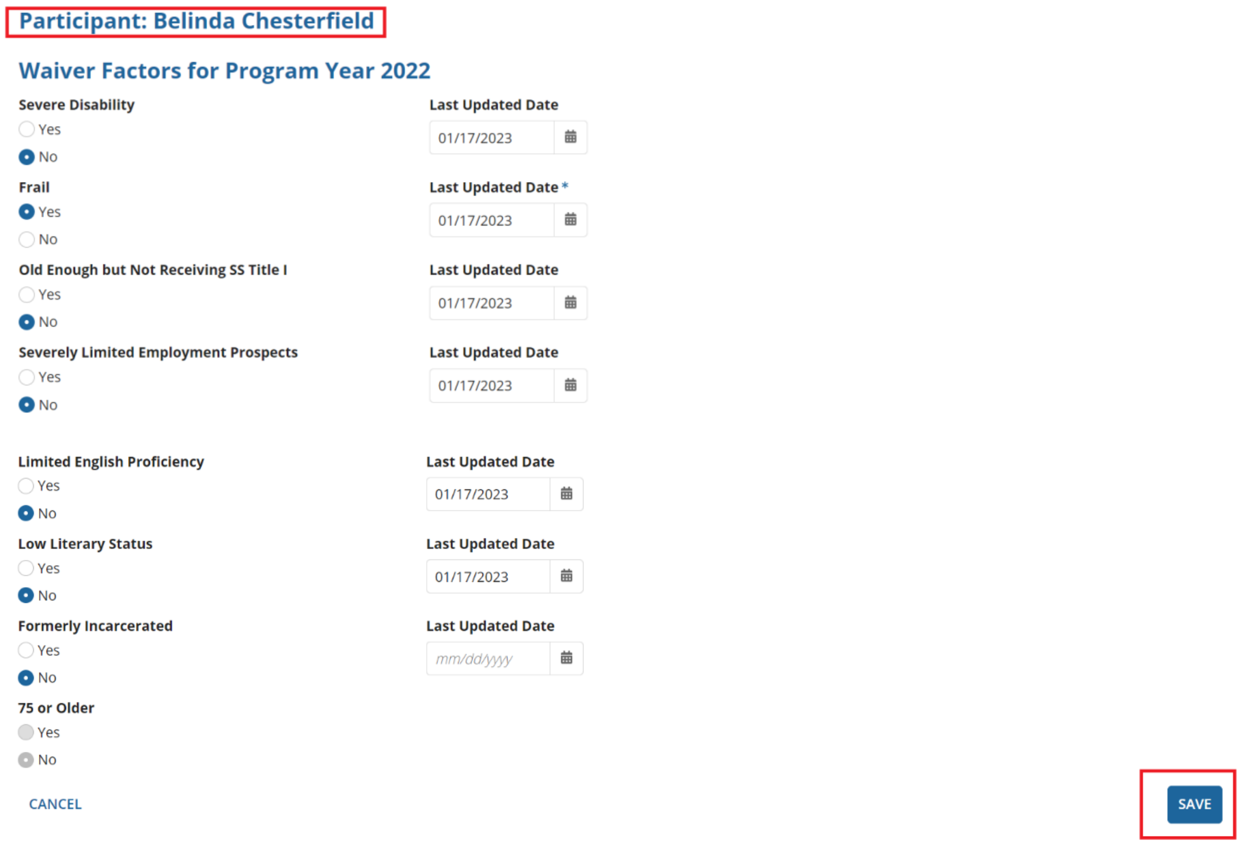
2022

Participant Name	Program Year	Waiver Updated
Adrian Allweather	2022	✔
Belinda Chesterfield	2022	✔
Brenda Johnson	2022	✔
Caroline O'Dell	2022	✔
Charles Dexter-Ward	2022	✔
Deliah Derbyshire	2022	✔
Edward Murphy	2022	✔
Grant Lore	2022	✔

8 items

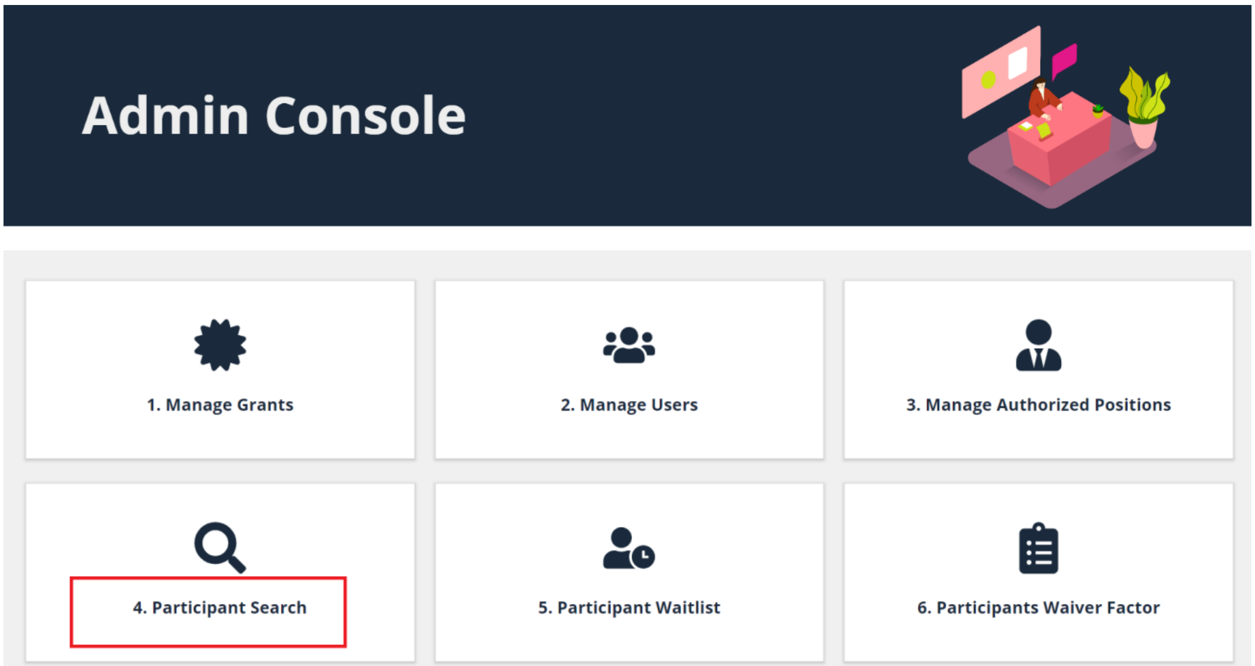
CLOSE

Edit the relevant **Waiver Factors**, as well as the **Last Updated Date**, and click **SAVE** to update the data. After clicking **SAVE**, you will return to the list of grantees with **Participant Waiver Factors** and if you have completed your updates, select, **CLOSE** to leave the utility.

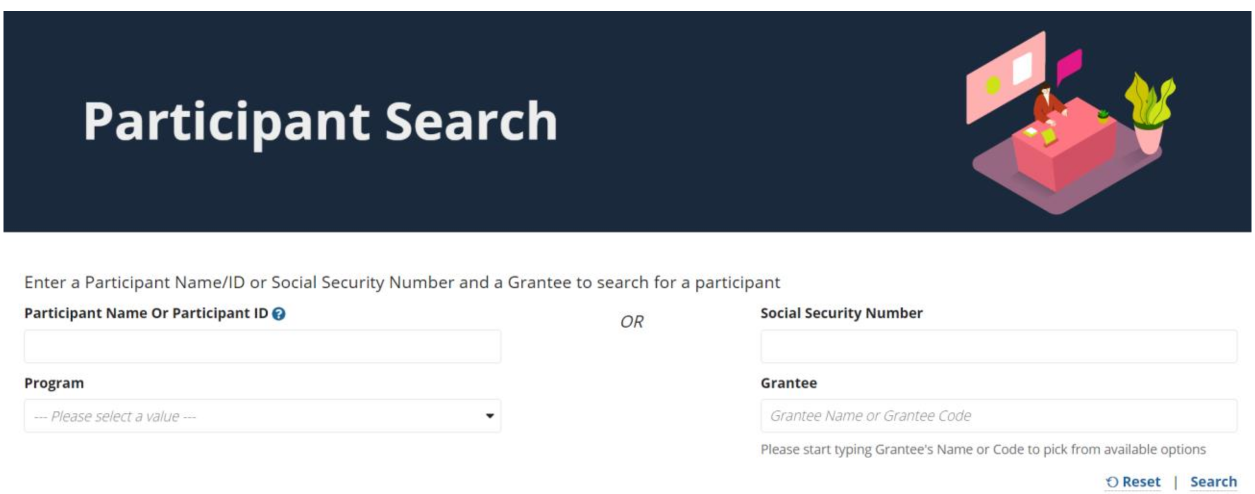


9. Participant Search

The **Participant Search** functionality can be accessed under the **Admin Console.**



Once selected, the **Participant Search** screen will appear.



To search for participants, enter a value in the **Grantee** field. In addition, the **Participants Name,** the **Participant ID,** the **Program,** or the **Social Security Number** can be entered to further filter the results.

Click **Search** to display a list of Participants matching the search criteria.

Participant Search

Enter a Participant Name/ID or Social Security Number and a Grantee to search for a participant

Participant Name Or Participant ID OR **Social Security Number**

Program

--- Please select a value ---

Grantee

National Older Workers Association (NOWA)

Please start typing Grantee's Name or Code to pick from available options

Reset | Search

Participant Name	Participant ID	Program	Eligible to Enroll?
Allweather, Adrian	10005587	New Jersey	No
Chesterfield, Belinda	10005588	New Jersey	No
Covey, Franklin	10005585	New Jersey	No
Derbyshire, Deliah	10005583	New Jersey	No
Dexter-Ward, Charles	10005582	New Jersey	No
Johnson, Brenda	10005581	New Jersey	No
Jones, Georgina	10005580	New Jersey	Yes
Lore, Grant	10005586	New Jersey	No
Murphy, Edward	10005584	New Jersey	No
O'Dell, Caroline	10005589	New Jersey	No

10 items

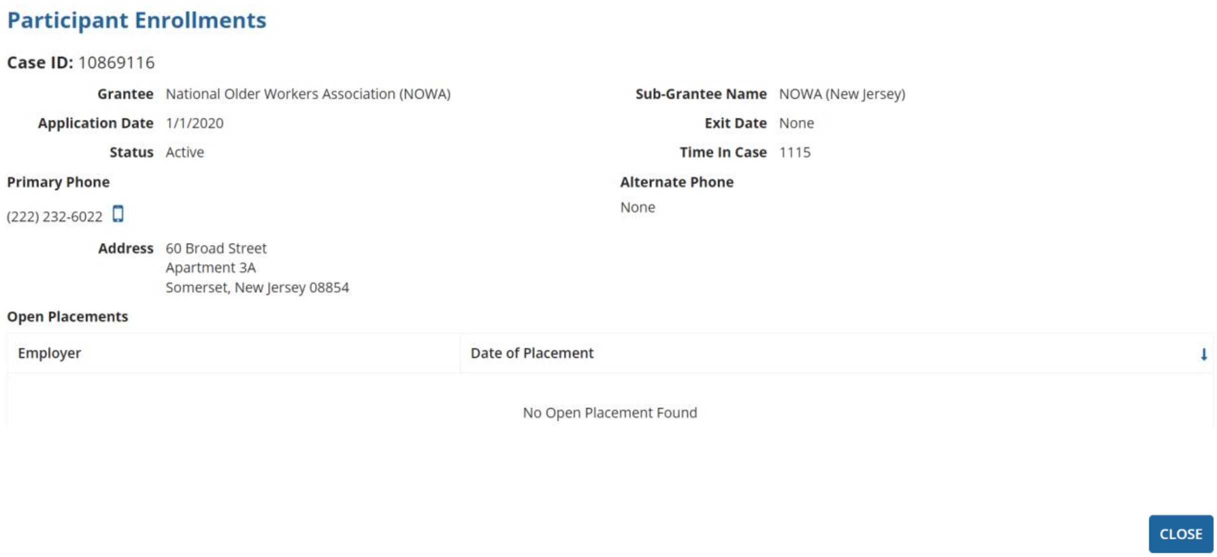
Select the participant's name from the list to open the **Participant's Summary** page.

Participant Summary For SCSEP Program

BACK TO SEARCH

Participant Summary

Participant Name	Adrian Allweather	**Participant ID**	10005587	**Date of Birth**	01/01/1950
Day(s) Left in Program	711	**Durational Limit Date**	12/30/2024	**Month(s) in Program**	36 months, 20 days
Date of Last Extension Request		**Eligible to Enroll?**	No		



If you would like to search for another participant, click on the **BACK TO SEARCH** link to return to the **Participant Search** screen. If you have completed searching, click **CLOSE** to return to the **Admin Console** screen.

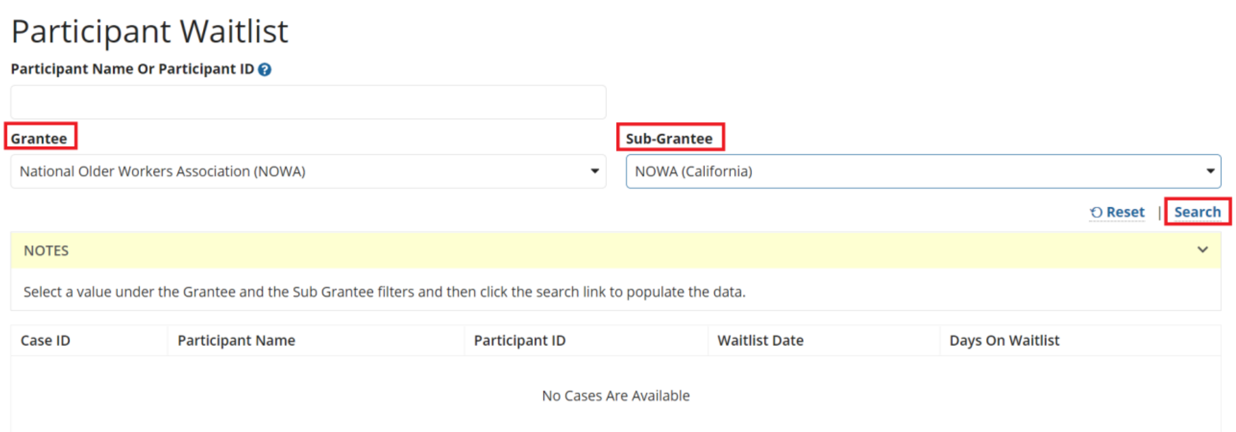
10. Participant Wait List

A sub-grantee or grantee administrator user can search for participants currently on the waitlist using this page. Below the title is a text box where the user can search by **Participant ID**, **First Name**, **Last Name** or **Full name**.

Below the search box are two dropdown fields labeled **Grantee** and **Sub-Grantee**. The Grantee dropdown-list shows all grantees associated with the user and is required to execute a search.

The following message displays in an expandable note below the dropdown:

> Select a value under the **Grantee** and the **Sub Grantee** filters and then click the search link to populate the data.



When the user clicks **Search** the table below populates with all records associated with the selected grantee and sub-grantee that are currently assigned to the waitlist. The table includes the following columns:

- **Case ID** – The case ID is displayed as hyperlinked text. When clicked, the user is redirected to the intake checklist for the case.
- **Participant Name** – The Participant First and Last name are displayed as text.
- **Participant ID** – The full Participant ID is displayed as text.
- **Waitlist Date** – The date the user was assigned to the waitlist formatted as MM/DD/YYYY.
- **Days On Waitlist** – The number of days (inclusive) the participant has been on the waitlist.
- **Enrollment Date** – The Date of enrollment for the participant formatted as MM/DD/YYYY.

Participant Waitlist

Participant Name Or Participant ID

Grantee

National Older Workers Association (NOWA)

Sub-Grantee

NOWA (New Jersey)

Reset | Search

NOTES

Select a value under the Grantee and the Sub Grantee filters and then click the search link to populate the data.

Case ID	Participant Name	Participant ID	Waitlist Date	Days On Waitlist
10869150	Susan Sangria	CMS010005614	1/24/2023	0
10869151	Arthur Park	CMS010005615	1/24/2023	0
10869152	Barbara Bain	CMS010005616	1/24/2023	0
10869149	Fred Rodgers	CMS010005613	1/24/2023	0
10869118	Caroline O'Dell	CMS010005589	1/23/2023	1

5 items

CANCEL

Participant Waitlist

Participant Name Or Participant ID

Grantee

National Older Workers Association (NOWA)

Sub-Grantee

NOWA (New Jersey)

Reset | Search

NOTES

Select a value under the Grantee and the Sub Grantee filters and then click the search link to populate the data.

Case ID	Participant Name	Participant ID	Waitlist Date	Days On Waitlist
10869150	Susan Sangria	CMS010005614	1/24/2023	0
10869151	Arthur Park	CMS010005615	1/24/2023	0
10869152	Barbara Bain	CMS010005616	1/24/2023	0
10869149	Fred Rodgers	CMS010005613	1/24/2023	0
10869118	Caroline O'Dell	CMS010005589	1/23/2023	1

5 items

CANCEL

Susan Sangria (Case ID: 10869150)

Summary | Assignments | Participant Required Actions | Participant History | Extensions | Related Actions

Summary | Intake | Eligibility | Recertification | Characteristics | Other Enrollment Information

Pending | Pending Eligibility Approval | Eligible | **Waitlist** | Pending Recertification | Exited - In Follow-Up | Exited - Closed | Locked

Participant Summary

Participant Name
Susan Sangria

Participant ID
CMS010005614

Month(s) in Program
0 months, 0 days

Primary Phone
(222) 222-2222

Age
73

Durational Limit Date

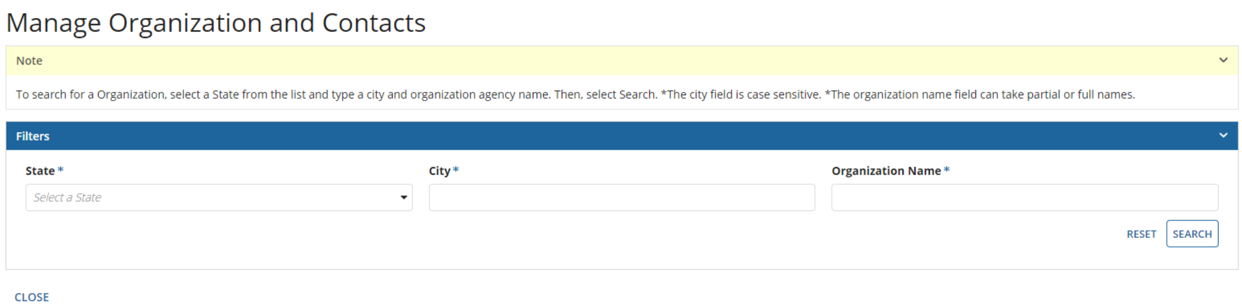
Day(s) Left in Program
0

Intake Checklist

Action Items	
Eligibility	✓
Characteristics	✓
Other Enrollment	✓
Program Introduction	✓

11. Manage Organizations and Contacts

Host agencies, employers, service providers, and their contacts can be created, updated, and viewed using the **Manage Organizations and Contacts** utility.



Notes about organizations:

- Once an organization is created, some of its information cannot be updated. This includes Organization Name, Organization Type, FEIN, and address. Only Program Analysts can update this information.
  If an organization requires an update, contact SCSEP Help for assistance.

- Organization types can be added to an organization, but not removed. If a user creates an organization and adds Host Agency as type, for example, that type cannot be removed. The Employer and Service Provider types can be added as additional types to that organization, but none of the types can be removed.
  If an organization type was added in error, contact SCSEP Help for assistance.

- For an organization to appear in a search in a participant record, the organization needs to be designated for that record's type first. For example, for an organization to appear in the Host Agency search in an assignment record, it needs to be designated as a Host Agency first. However, since all grantees share the same organizations, only one sub-grantee across all grantees needs to make the designation for it to appear. If an organization is known to exist but does not appear in the Host Agency search, then no sub-grantees have designated the organization as a Host Agency yet. Any one sub-grantee can make the designation for it to appear.

  Employers work the same way in that they need to be designated as an employer to appear in the search in a placement record. Service providers need to be designated as a service provider to appear in the search for service providers.
  Organization types can be added under the Additional Details section, which is described below.

- Organizations cannot be duplicated based on name, city, and state.
  For example, these two organizations are considered duplicates and cannot be added to the system:
  Target, 123 Main Street, Rockville, MD
  Target, 345 Oak Avenue, Rockville, MD

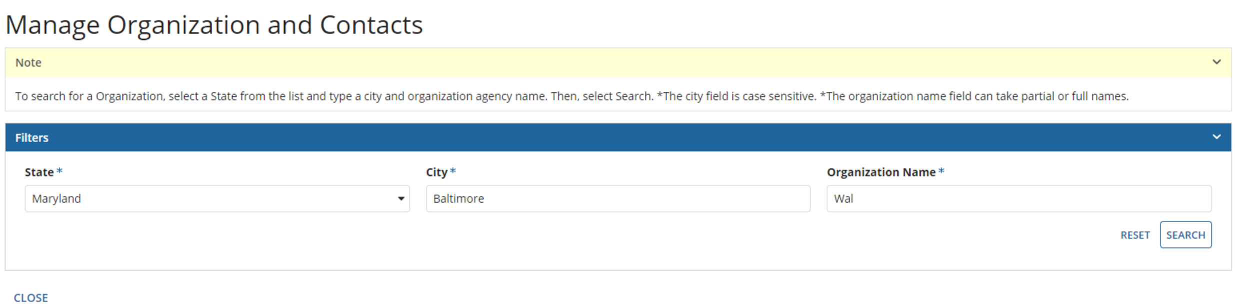
  However, these two organizations are not considered duplicates:

Target, 123 Main Street, Rockville, MD
Target, 123 Main Street, Bethesda, MD

11.1 Search for An Organization

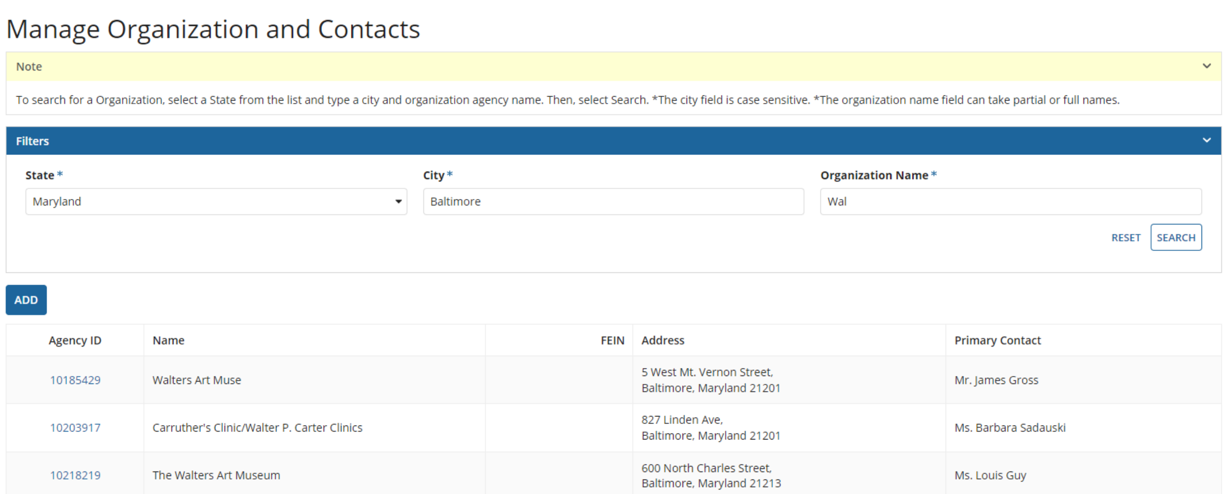
To search for an organization:

1. Select the state from the dropdown.
2. Enter the city.
3. Enter the organization name.
   Note that the entire name does not need to be entered. A minimum of one character can be entered. The results will display all organizations containing that character in the selected city and state.



4. Click **SEARCH.**

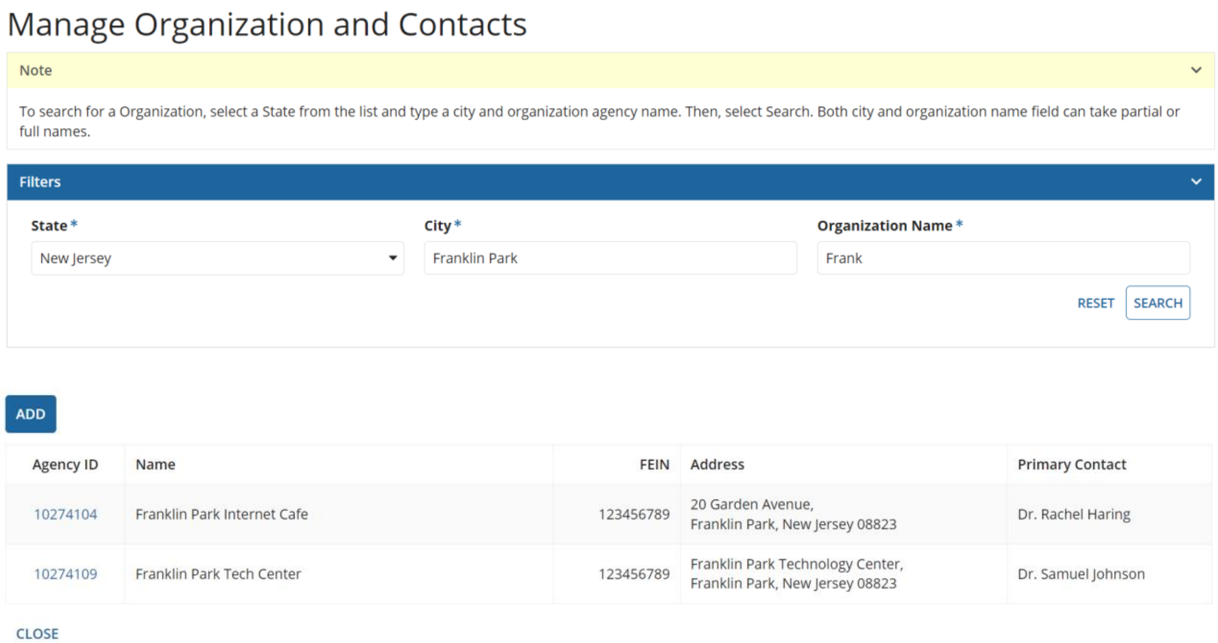
   A results list populates with organization details that match the search criteria.



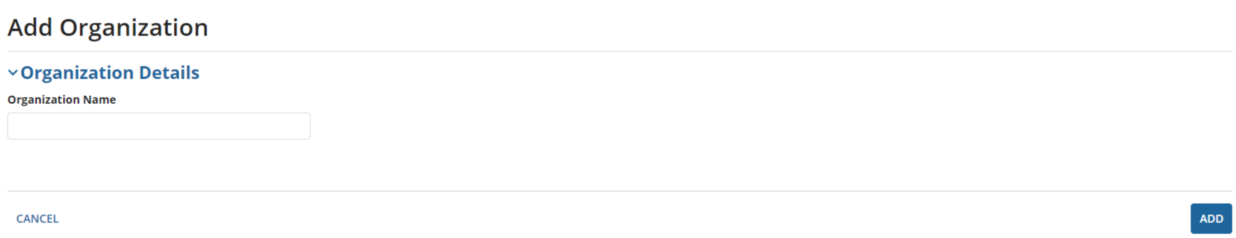
11.2 Add an Organization

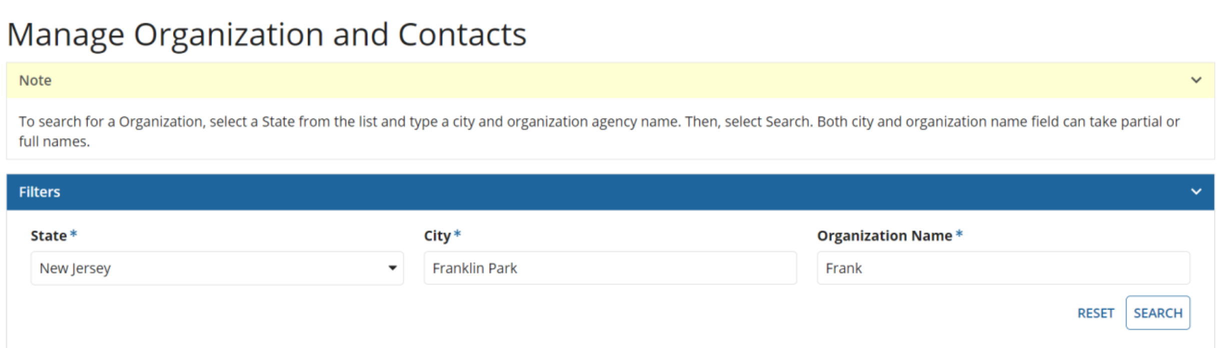
To add an organization, first conduct a search to determine if the organization is already in the system.

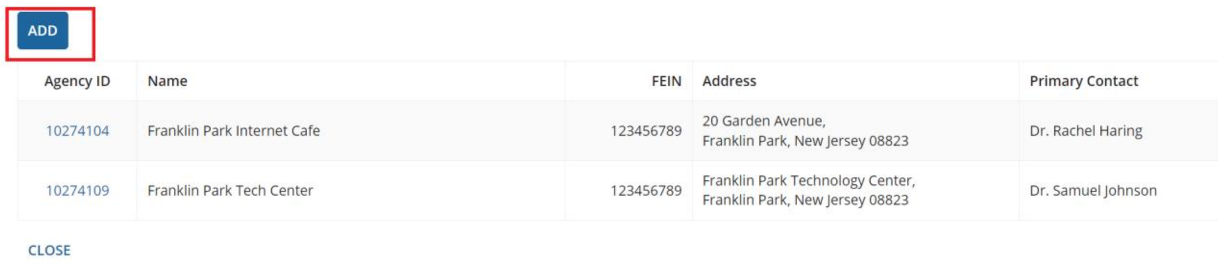
1. If the organization is not found in the search results, click **ADD** to create a new organization.



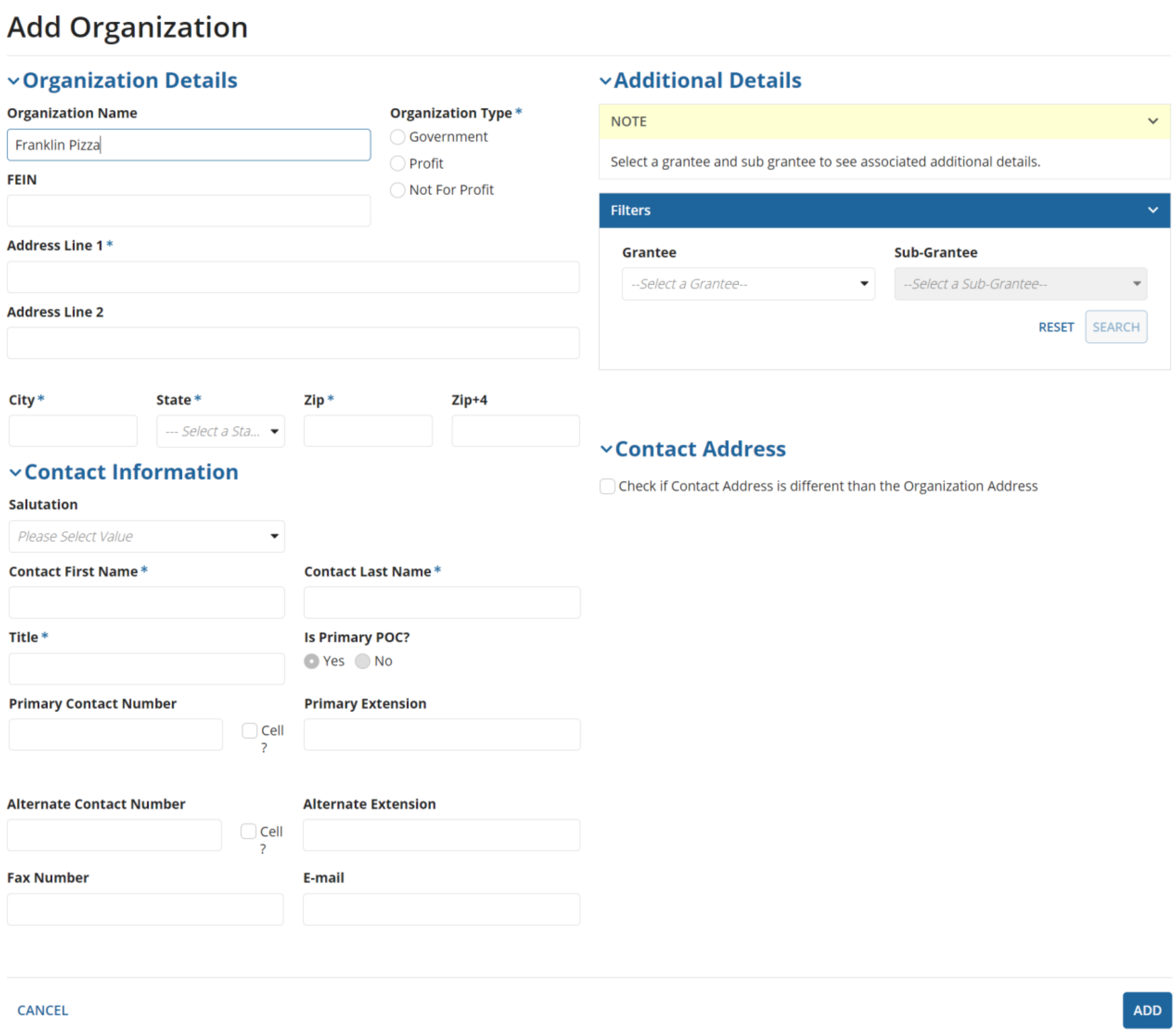
The system navigates to the **Add Organization** screen.







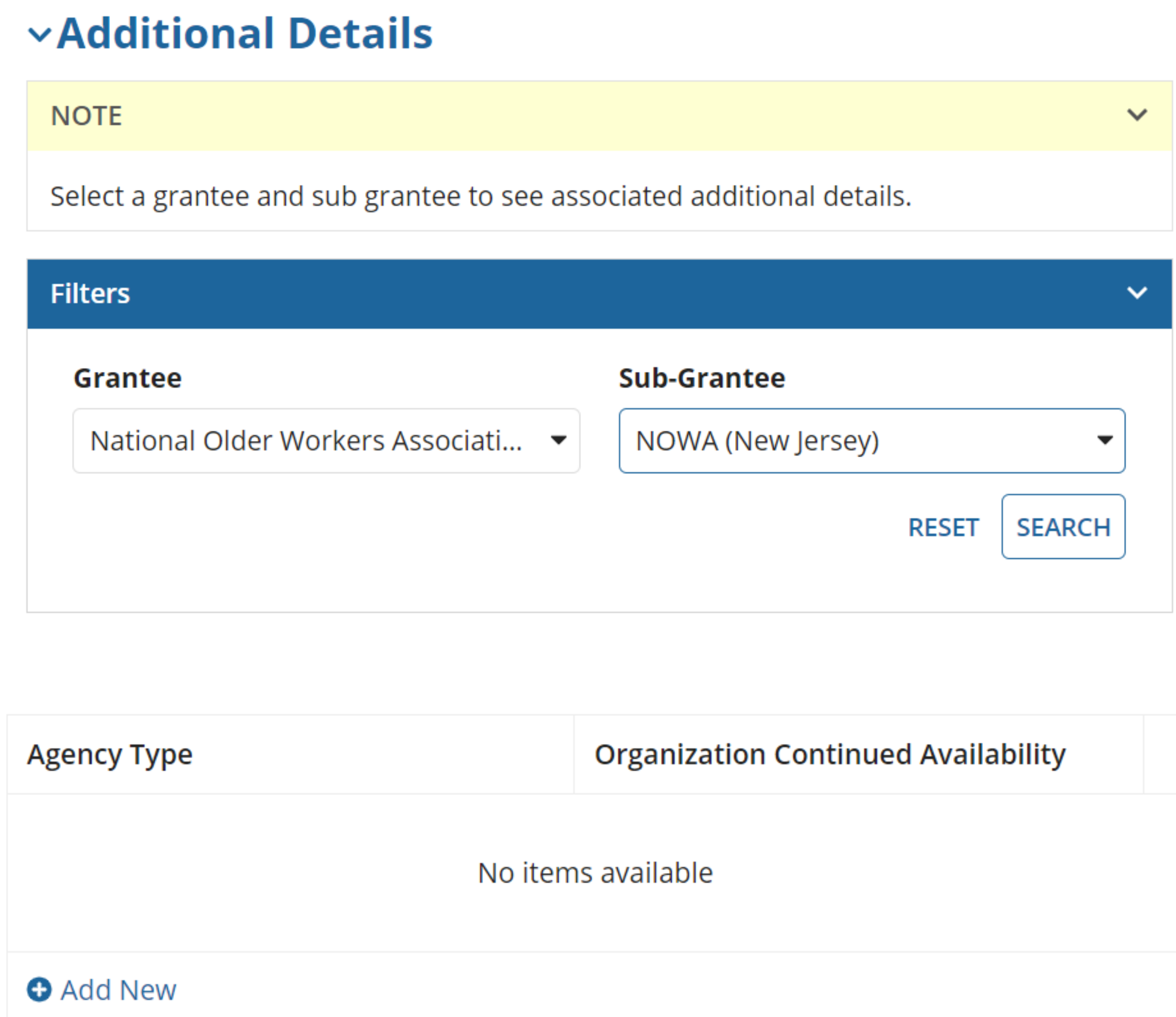
2. Enter the name of the organization to be created.
3. Click anywhere on the screen to display further data entry fields.



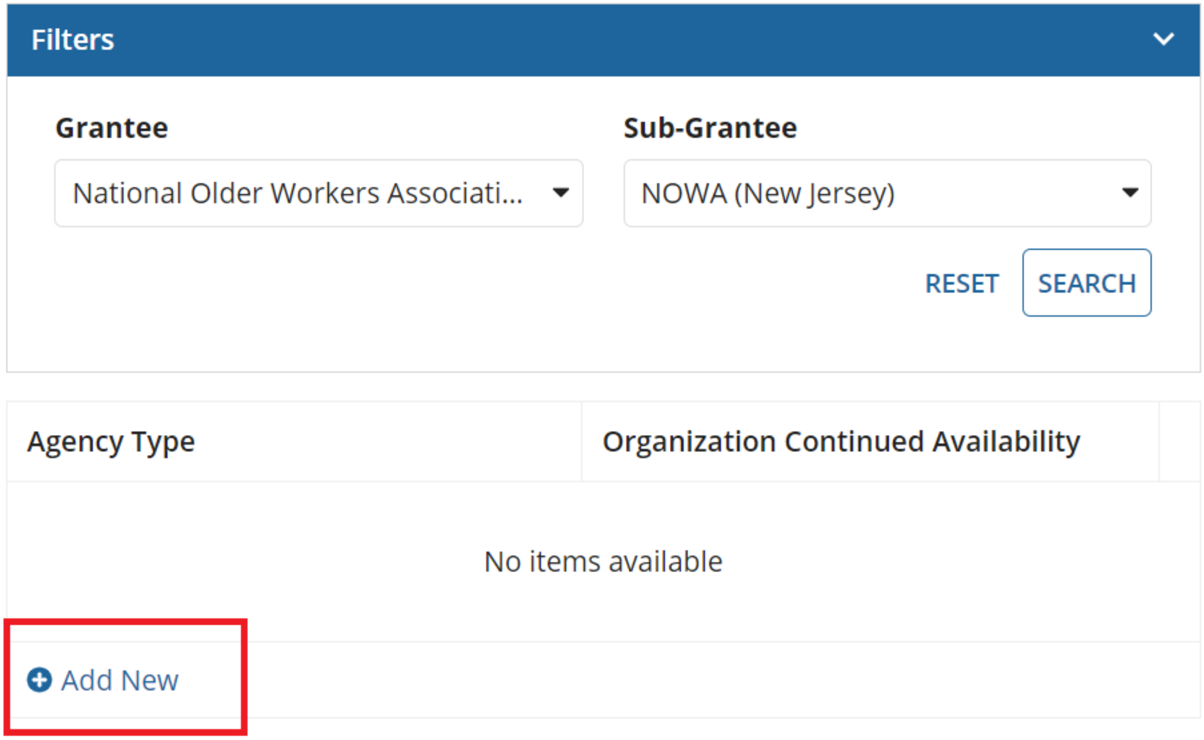
4. Enter the organization's and the primary contact's information.

5. Under **Additional Details**, each sub-grantee can add additional details and designate the type of organization (host agency, employer, and/or service provider), if necessary.

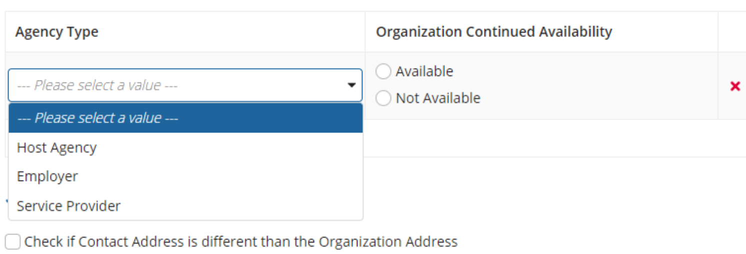
   a. To add them, select the grantee and sub-grantee, and click **SEARCH**. Additional details fields will be displayed on the screen.



   b. Click the **Add New** link. A dropdown for **Agency Type** appears.

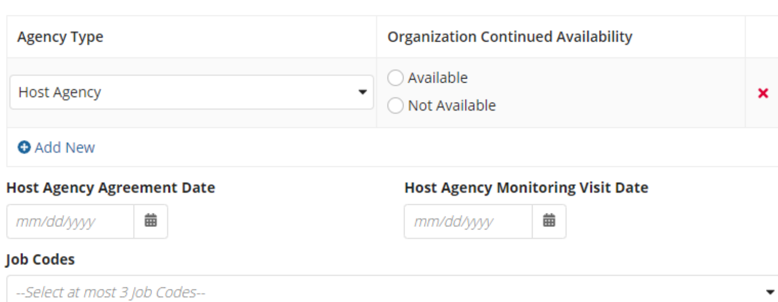


c. Select the type to which to designate and/or add additional details.



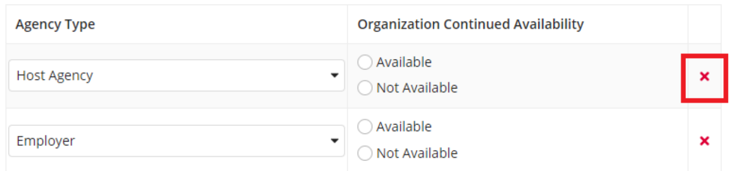
d. Enter the information as necessary.

Note that if the organization is only being designated as a host agency, employer, or service provider, no other fields in the **Additional Details** section need to be entered.



e. If further designations or details are necessary, click on the **Add New** link and select an Agency Type.

f. To remove an Agency Type before the record is saved, click the red X to remove the type.

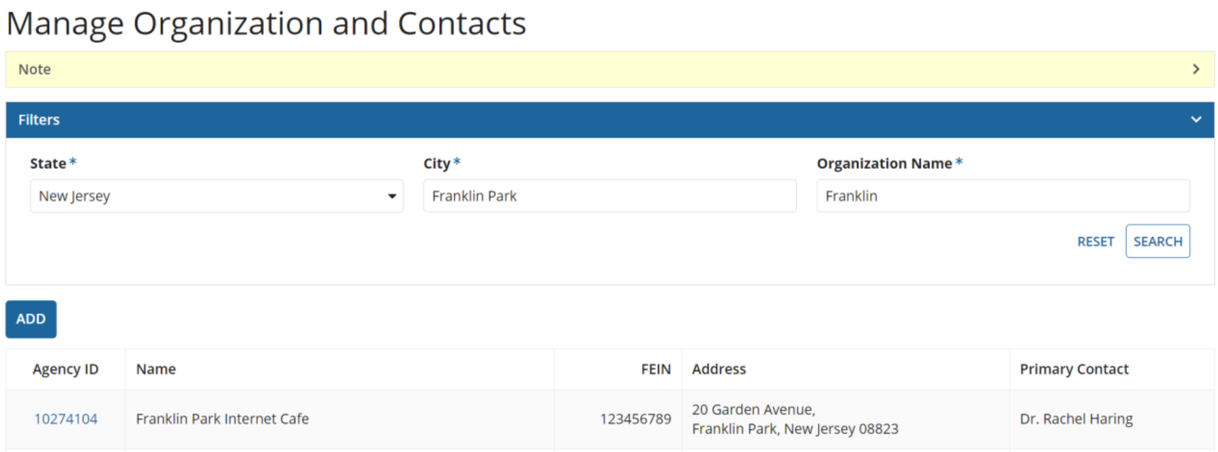


Note that once the record is saved, the designated type cannot be removed. Contact SCSEP Help for assistance in updating the type.

6. Once all information is added, click **ADD** to create the organization.

11.3 Edit an Organization

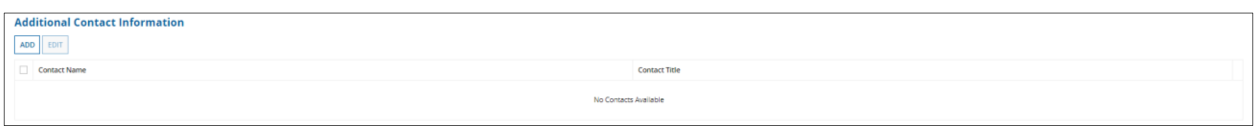
1. To edit an organization, conduct a search to find the organization.



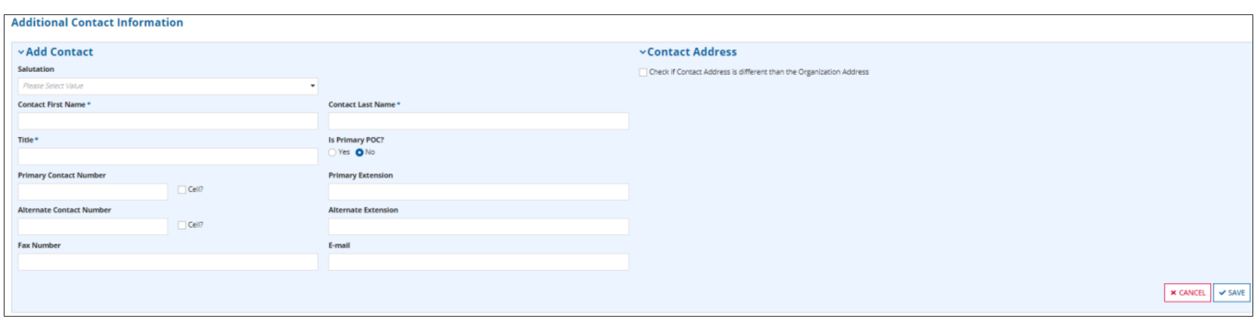
2. Click on the **Agency ID** of the organization requiring an edit.
3. Edit the necessary information.
4. Click **SAVE** to save the changes.

11.4 Add Additional Contacts

1. To add additional contacts to an organization, conduct a search to find the organization.
2. Click on the **Agency ID** of the organization requiring additional contacts.
3. Click **ADD** under Additional Contact Information.



Additional contact data entry fields are displayed.



4. Enter the additional contact's information.

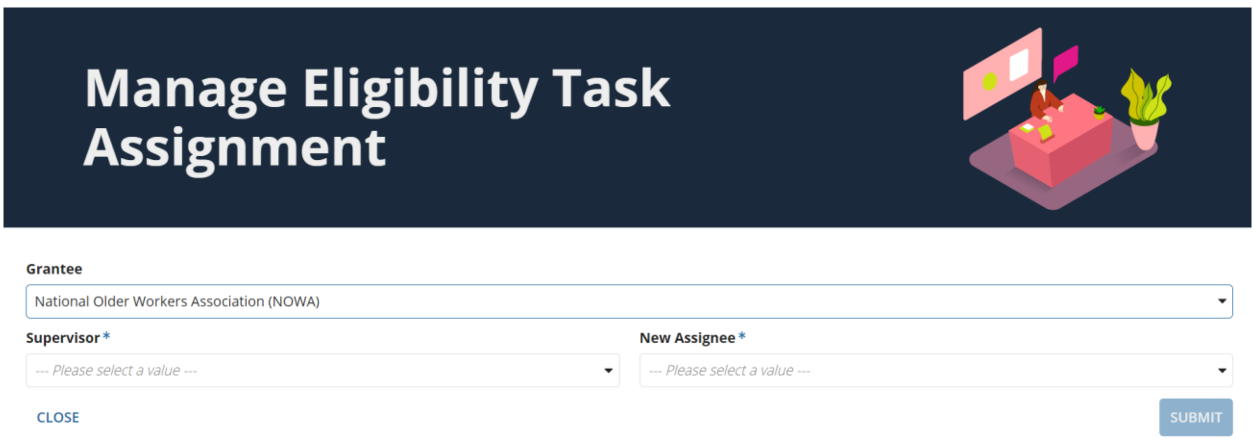
5. Click **SAVE**.

   The additional contact is added to the organization.

13. Manage Eligibility Task Assignment

The **Manage Eligibility Task Assignment** page can be accessed from the **Admin Console** and is available to Program Analyst and Grantee Administrators to ensure that eligibility tasks are routed to the appropriate party.

Below the main heading, a dropdown labeled **Grantee** is displayed. When a grantee is selected, two additional dropdowns appear below the **Grantee** dropdown. The dropdowns are labeled **Supervisor** and **New Assignee.**



The **Supervisor** dropdown is where the user selects the role they want to reassign tasks from. The **New Assignee** dropdown is where the user selects the role they want to reassign tasks to. Both dropdowns include roles of supervisor and above associated with the grantee. If a user selects the same person in both dropdowns, the following message is displayed in a red box below the dropdowns:

The new supervisor cannot be the same as the previous.

14 Extracts

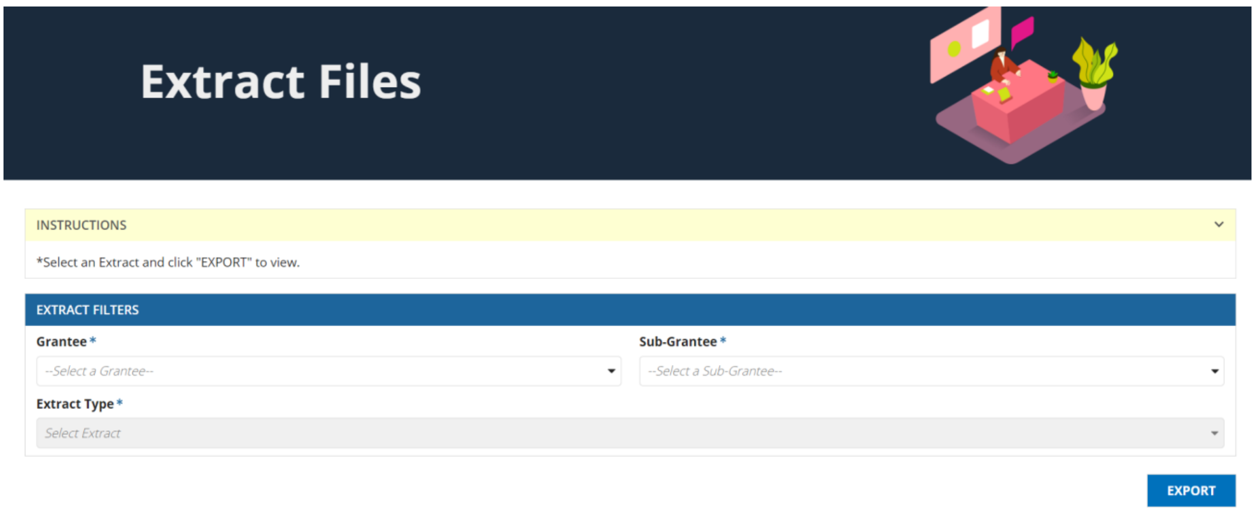
Grantee administrators and program analysts can export extracts from the ADMIN CONSOLE for the grantees to which they are assigned. The extracts available for export are Participant Extract, Waiver Extract and Break Extract.

Select **Extracts** from the **ADMIN CONSOLE**. The Extracts Files page is loaded.

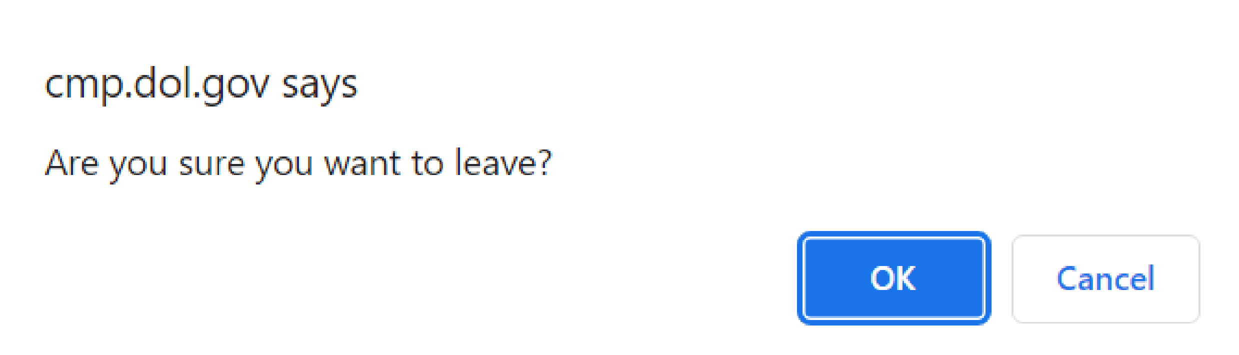
The Grantee, Sub-Grantee and Extract Type fields are required.

Select the **Grantee**, **Sub-Grantee** and **Extract Type** from the list.

Click the **EXPORT** button.



A confirmation dialog box is displayed.

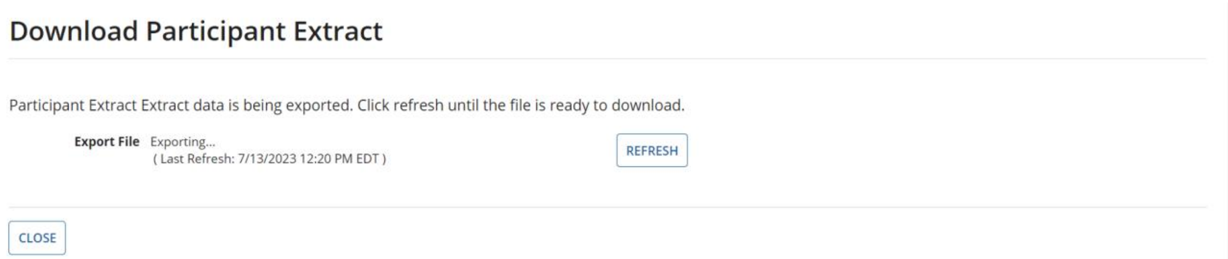


Click the **OK** button to proceed with the export.

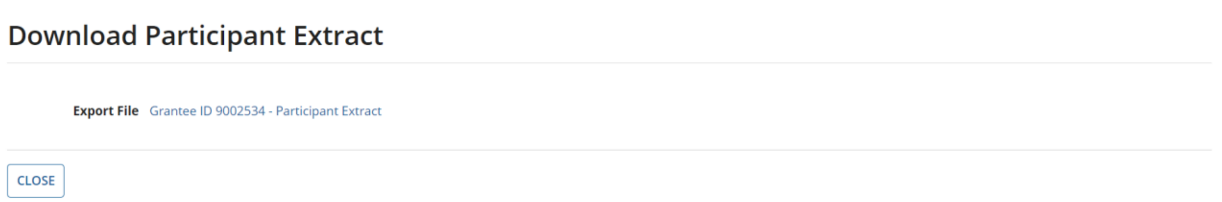
Click the **Cancel** button to cancel the export.

The Download Participant Extract screen is displayed with the **REFRESH** and **CLOSE** buttons.

Click the **REFRESH** button to see the latest status of the export.



The Download [extract type chosen] Extract page is displayed with a linked extract file.



Click the linked file name.

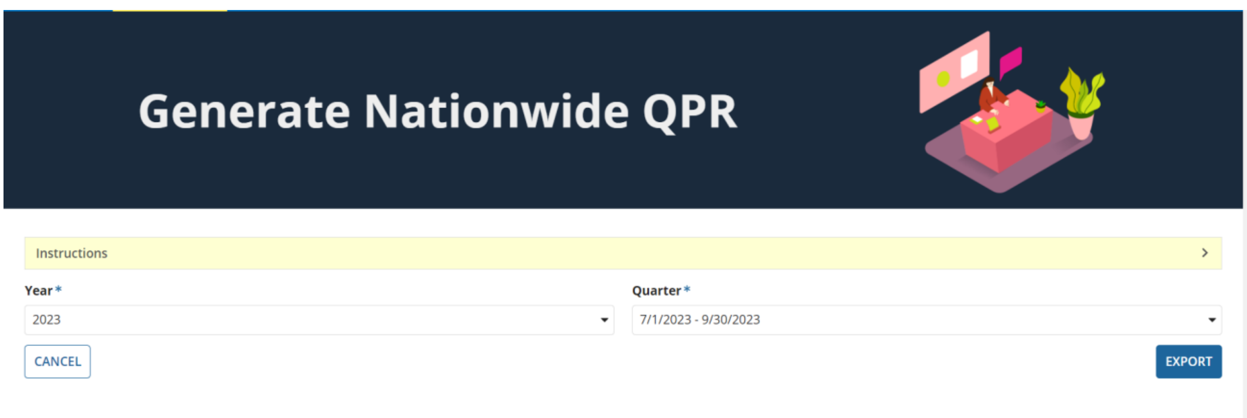
The file is downloaded in .csv format.

15. Nationwide QPR Report

The Nationwide QPR Report is located on the **ADMIN CONSOLE.**

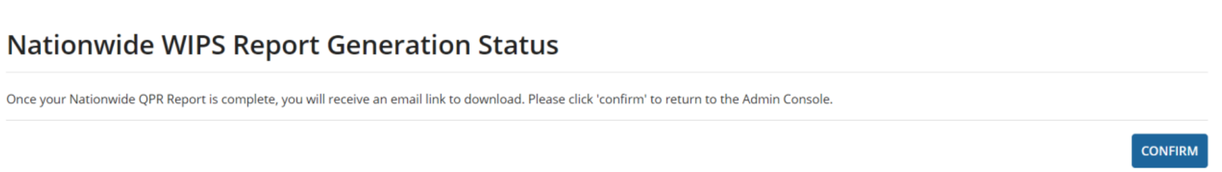
Click the Nationwide QPR Report tab.

The Generate Nationwide QPR page is displayed, with the **Year** and **Quarter** fields which are required.



Select a Year and Quarter from the lists.

Click the **EXPORT** button to proceed with generating the Nationwide QPR. The Nationwide WIPS Report Generation Status page is displayed.



Click the **CONFIRM** button. An email will be sent to you with a link to download the QPR requested.

Your Nationwide QPR Report is ready

US

admin@cmp.dol.gov on behalf of United States Dep

To [redacted]

1:51 PM

Hello,

Your Nationwide QPR Report is ready for download. Please click the link below to access the report.

[PY 2022 Qtr 4 Performance Report for SCSEP]

Request Date: 7/13/2023 1:24 PM EDT

Thank you.

Note: Please do not reply. This message has been sent by a notification only system. The link will expire after 5 hours.

Click the link in the email received to download the report. The Report Confirmation screen is displayed with the name of the report, the size of the report, the name of the person who generated the report, the date the report was generated and the download icon.

Report Confirmation

SCSEP Internal Performance Status Report

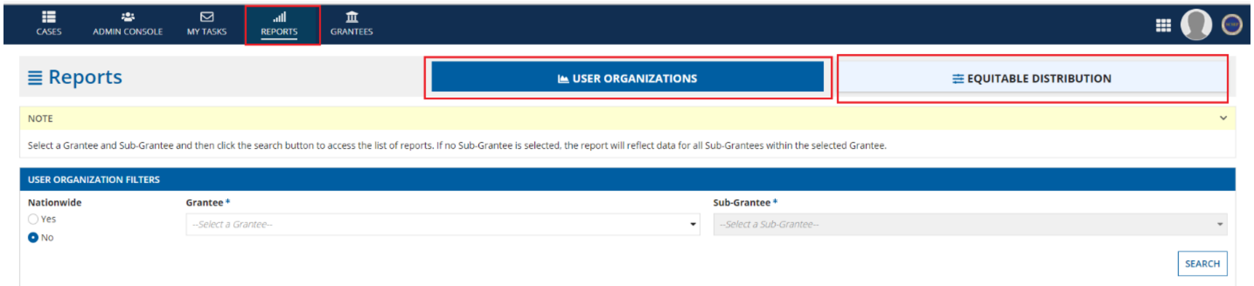
Name	Size	Generated By	Generated Date	Download
SCSEP Performance Status Report: 07-13-2023 01:49:43	16.155 KB	[redacted]	7/13/2023 1:49 PM EDT	

CLOSE

Click the Download icon. The report will be downloaded in excel format.

REPORTS

All Reports related to the SCSEP program can be accessed in this section. Depending on what level you login at, you will be able to access different reports (a full list by login is presented below).



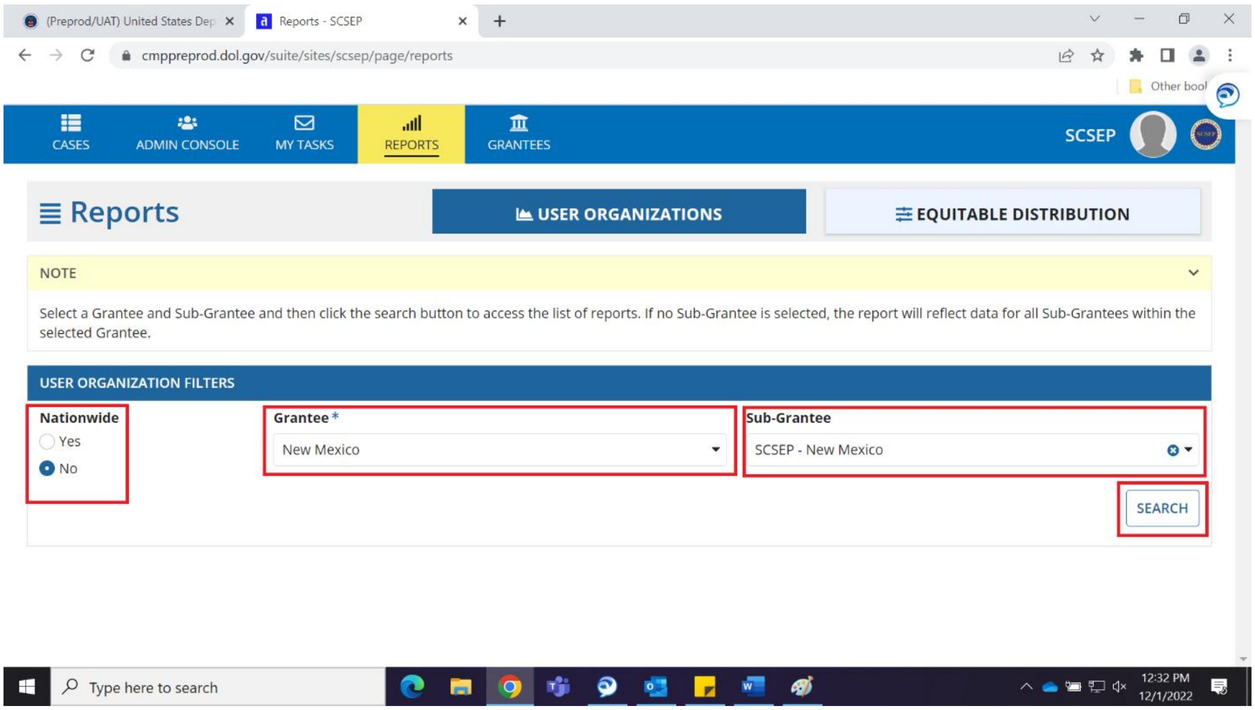
This section has two tabs

- User Organizations
- Equitable Distribution

1. User Organization

To access the Reports

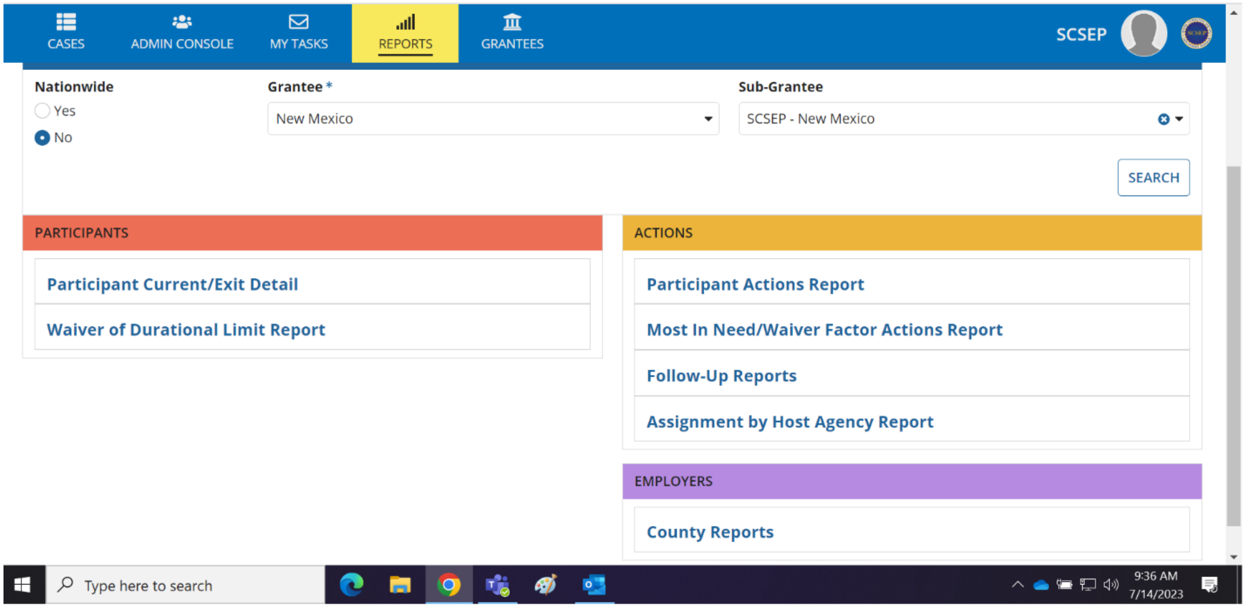
- Select the **YES** radio button under **Nationwide** for Nationwide reports
- Select the **NO** radio button under **Nationwide** to run individual Grantee reports
- Select a **Grantee** from the drop-down **Grantee** field
- Select a **Sub Grantee** (If a value for Sub- Grantee is not selected, the reports will reflect data for all the Sub-Grantee within the selected Grantee)
- To run a consolidated grantee report, select the same grantee name in the **Sub-Grantee** drop down
- Click **Search**



Depending on your level of login you will see Participants (reports centered around program participants); Actions (EXPLANATION); and/or Employers (EXPLANATION) reports listed.

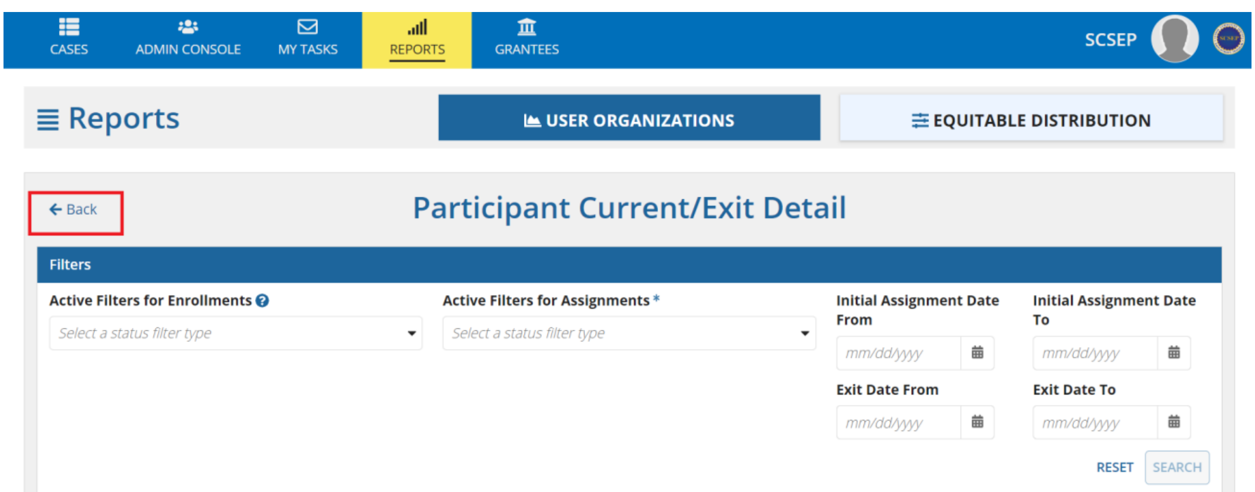
1. **Case Manager:**
    a. *Participants:* Participant Current/Exit Detail; Approved Breaks in Service; Durational Limit Extension; Waiver of Durational Limit Report; Participant Hours Report.
2. **Supervisor:** As above, for Case Manager for *Participants*.
3. **Sub-Grantee Admin:** As above, for Case Manager for *Participants*.
4. **Grantee Admin:** As above, for case Manager, **plus** these additional.
    a. *Participants:* Also includes Participant/Case Extract Report.
    b. *Actions:* Participant Actions Report; Most in Need/Waiver Factor Actions Report.
    c. *Employers:* Customer Satisfaction Survey; Follow-Ups Report
5. **Program Analyst:** As above for Grantee Admin, **plus** these additional.
    a. *Participants:* As above for Grantee Admin.
    b. *Actions:* As above for Grantee Admin.
    c. *Employers:* Also includes County Reports.

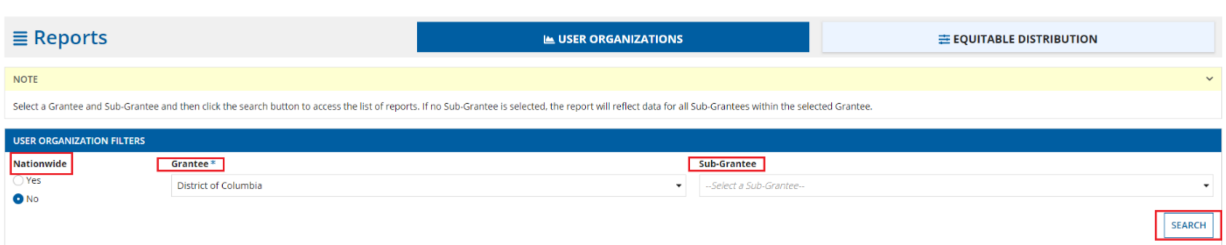
The image below shows the entire list of reports, which is only accessible at the Program Analyst level.



These reports will be described in the following sections. Remember that not all reports will be available for all users.

To select any report, click on the report name. To get back to the list of reports from the first screen of an individual report, click on the link that says <= Back.



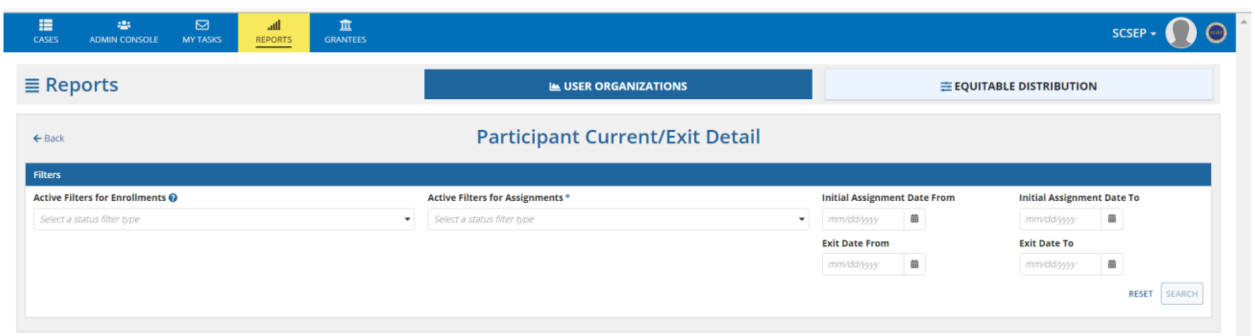


There are 3 sections for User Organizations

1. Participants
2. Actions (reports scheduled for future development)
3. Employers

1.0 Participants

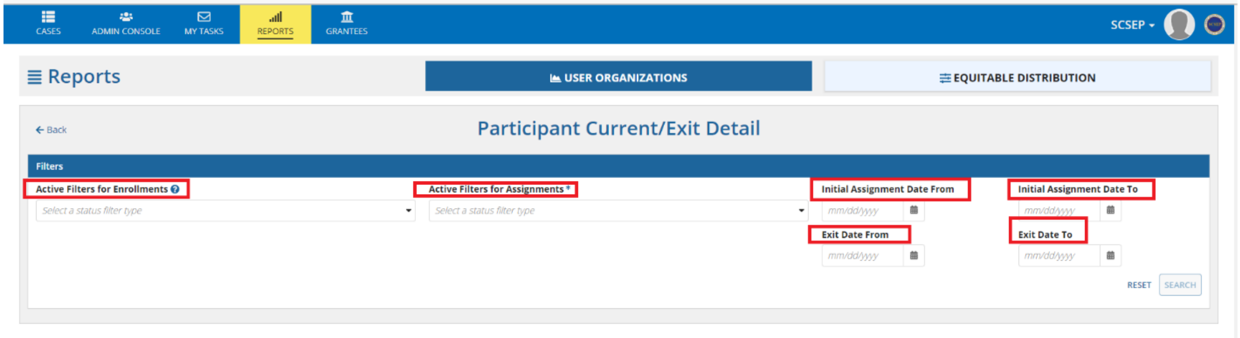
1.1 Participant Current/Exit Detail



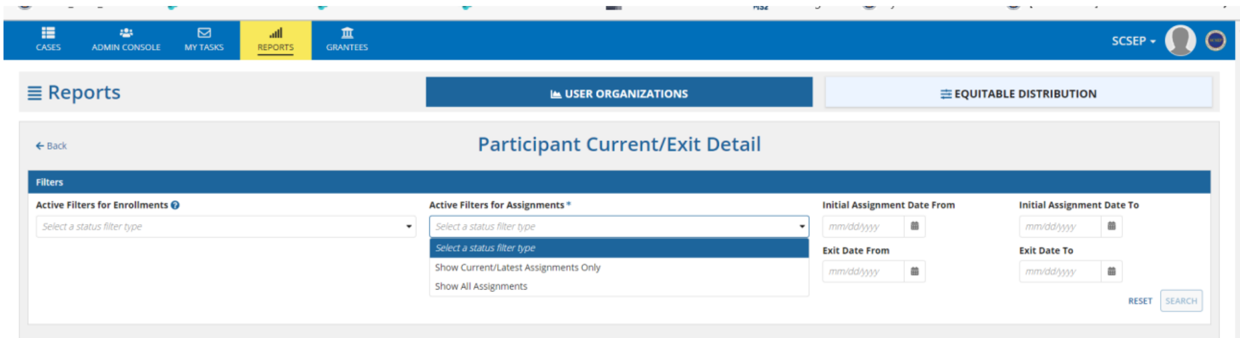
This report can be filtered by the following

- **Active Filters for Enrollments**: There are two choices. Show Currently Active Enrollments Only or Show Exited Enrollments Only.
- **Active Filters for Assignment**: There are two choices. Show Current/Latest Assignments Only or Show All Assignments.
- **Initial Assignment Date From**: Optional field to narrow your search.
- **Initial Assignment Date To**: Optional field to narrow your search.
- **Exit Date From**: Optional field to narrow your search.
- **Exit Date To:** Optional field to narrow your search.

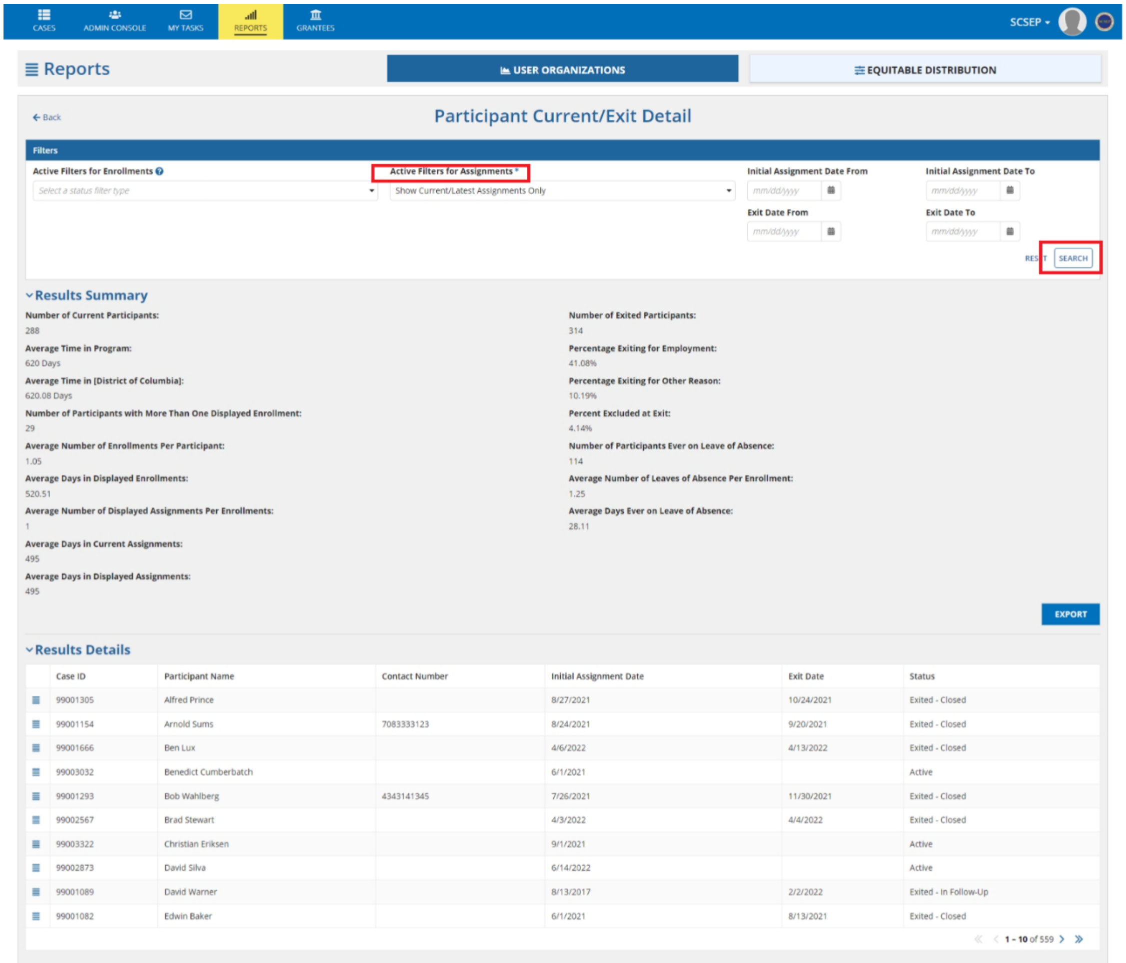
Clicking Reset will clear the values for the filters.



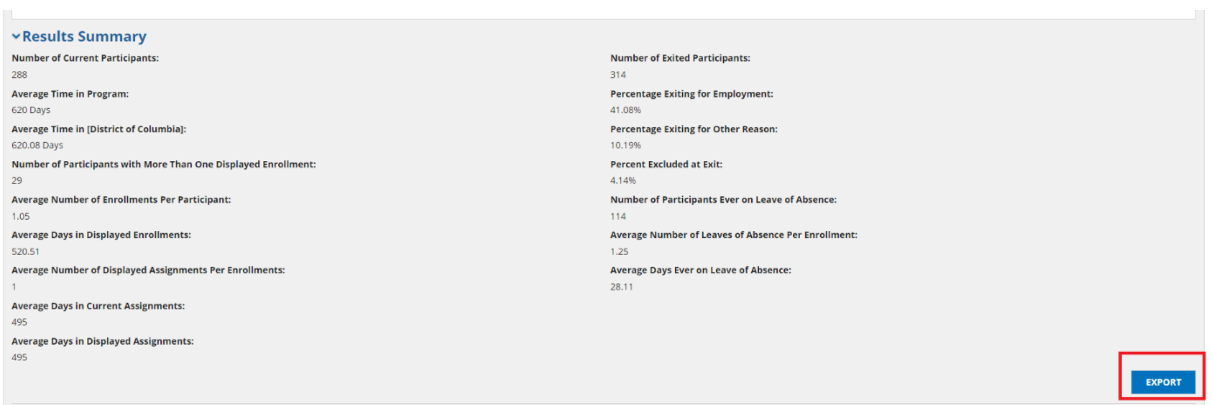
Active Filters for Assignment is a required field.



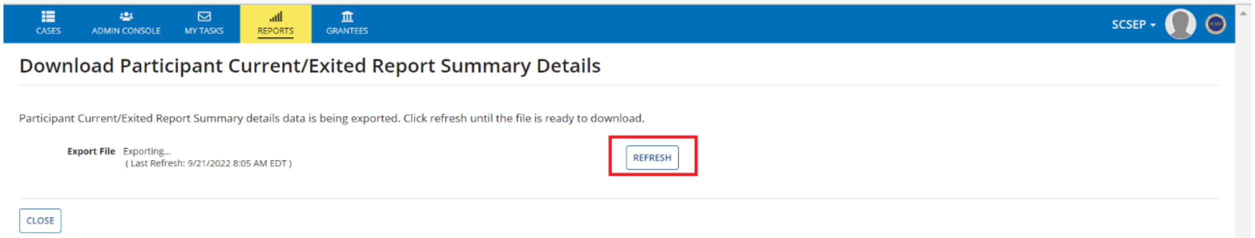
Choose desired filters and click **SEARCH. The screen will display aggregate results for the Grantee/Sub-Grantee combination you have chosen under the top half, Results Summary and show you individual cases under the bottom half, as Results Details.**



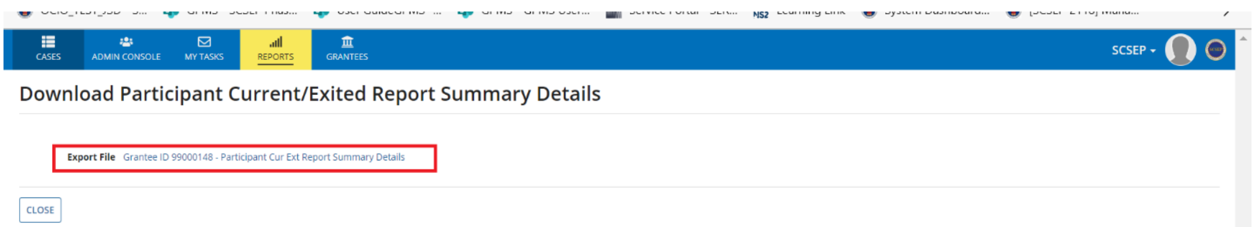
The **Results Summary** section of the report can be exported by clicking **EXPORT**.



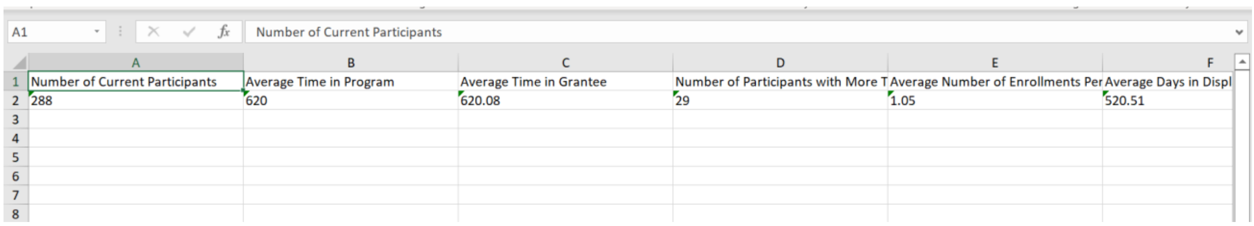
Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.

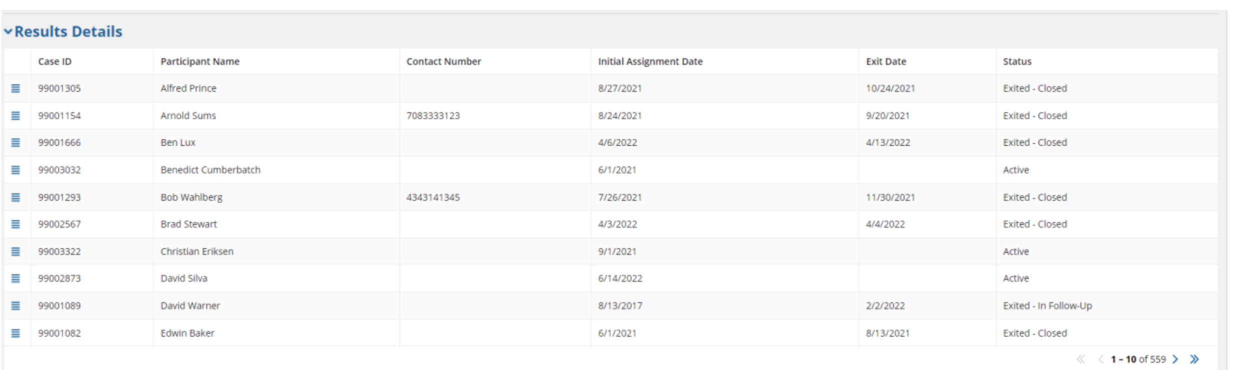


The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



	A	B	C	D	E	F
1	Number of Current Participants	Average Time in Program	Average Time in Grantee	Number of Participants with More T	Average Number of Enrollments Per	Average Days in Displ
2	288	620	620.08	29	1.05	520.51

Result Details Section - The Individual Participant report can be viewed/exported in this section.

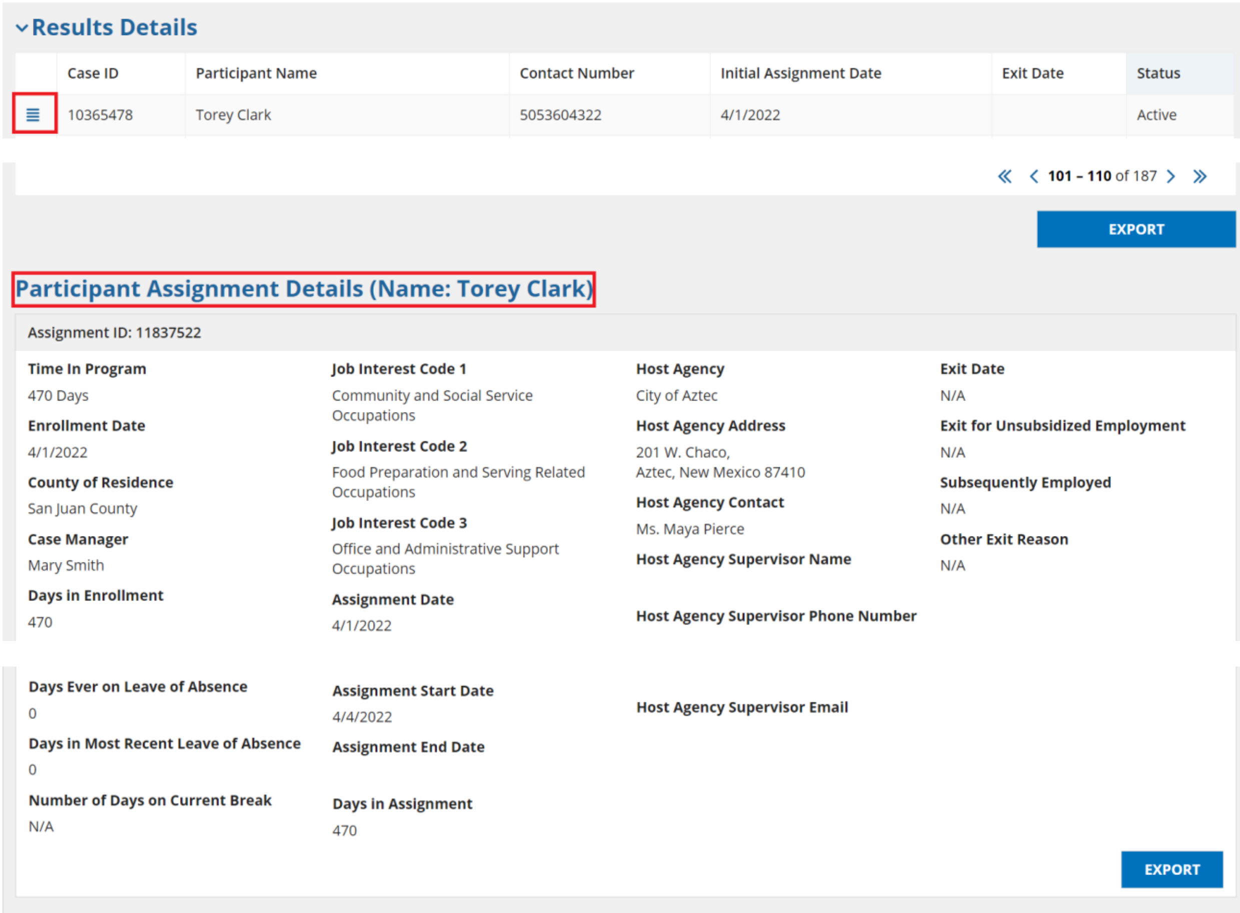


Results Details

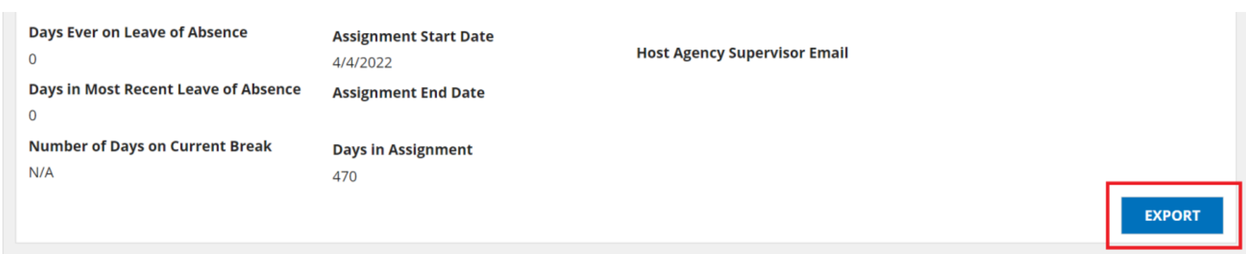
Case ID	Participant Name	Contact Number	Initial Assignment Date	Exit Date	Status
99001305	Alfred Prince		8/27/2021	10/24/2021	Exited - Closed
99001154	Arnold Sums	7083333123	8/24/2021	9/20/2021	Exited - Closed
99001666	Ben Lux		4/6/2022	4/13/2022	Exited - Closed
99003032	Benedict Cumberbatch		6/1/2021		Active
99001293	Bob Wahlberg	4343141345	7/26/2021	11/30/2021	Exited - Closed
99002567	Brad Stewart		4/3/2022	4/4/2022	Exited - Closed
99003322	Christian Eriksen		9/1/2021		Active
99002873	David Silva		6/14/2022		Active
99001089	David Warner		8/13/2017	2/2/2022	Exited - In Follow-Up
99001082	Edwin Baker		6/1/2021	8/13/2021	Exited - Closed

1 - 10 of 559

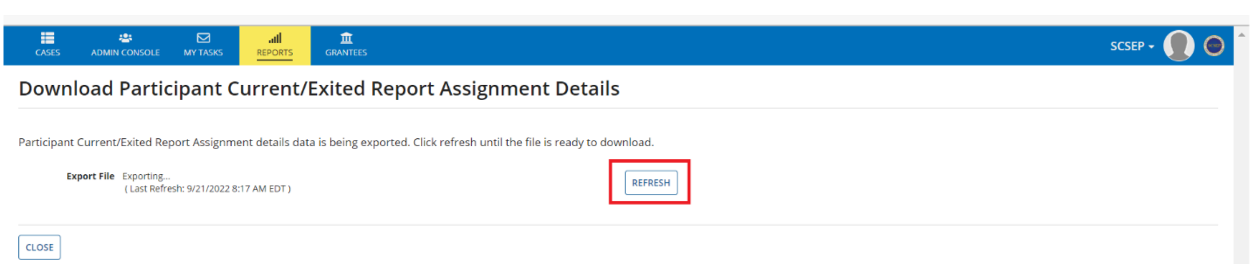
To view an individual Participant's report, click on the icon next to **Case Id**. The screen will refresh and the individual Participant's report will be visible at the bottom of the screen (you may have to scroll down).



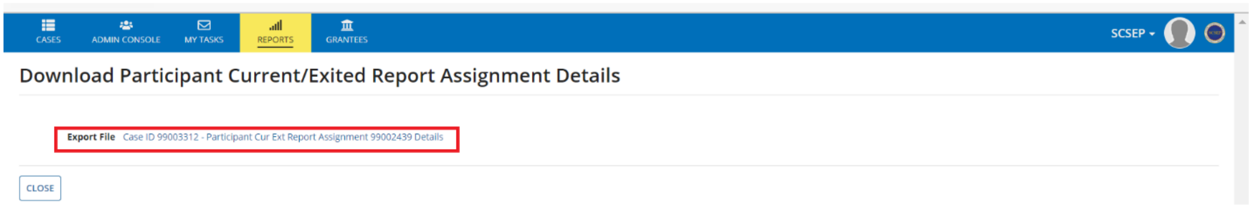
The Participants report can be exported by clicking **EXPORT**.



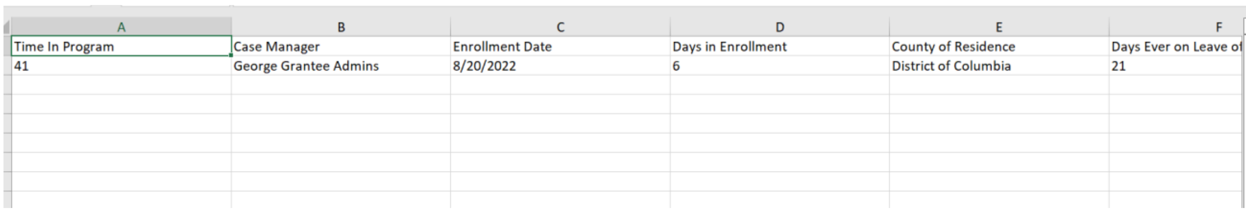
Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.

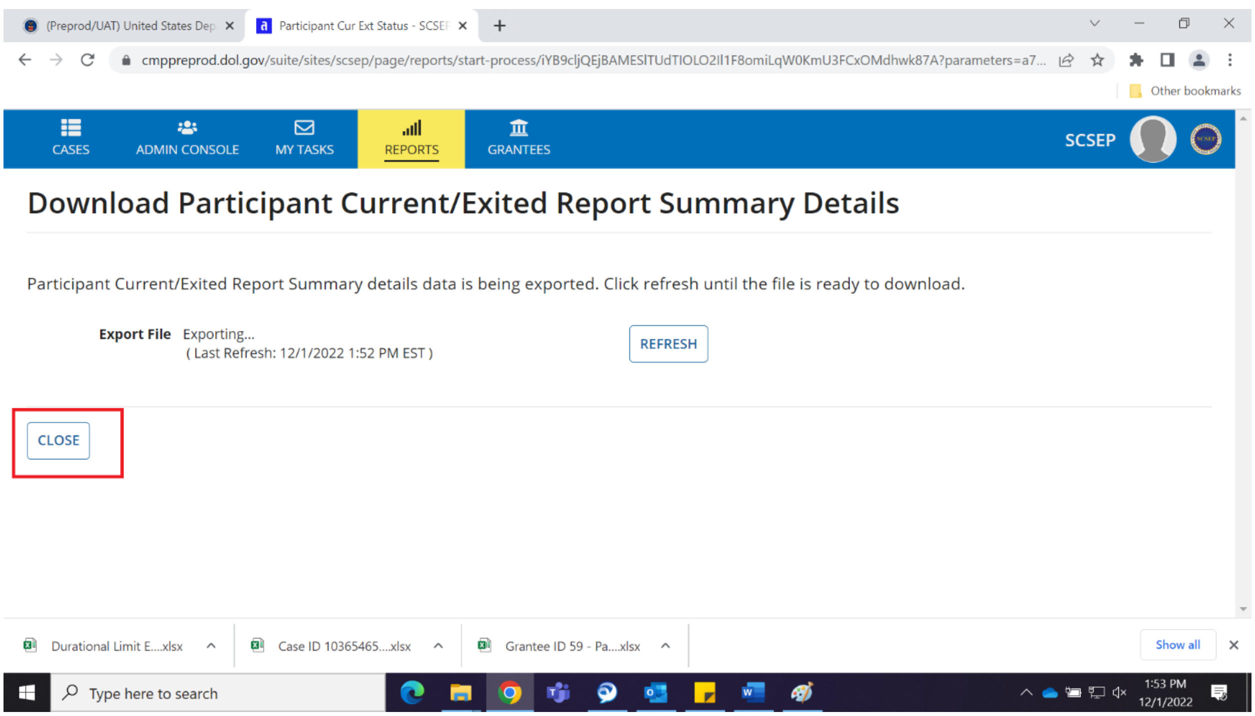


The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

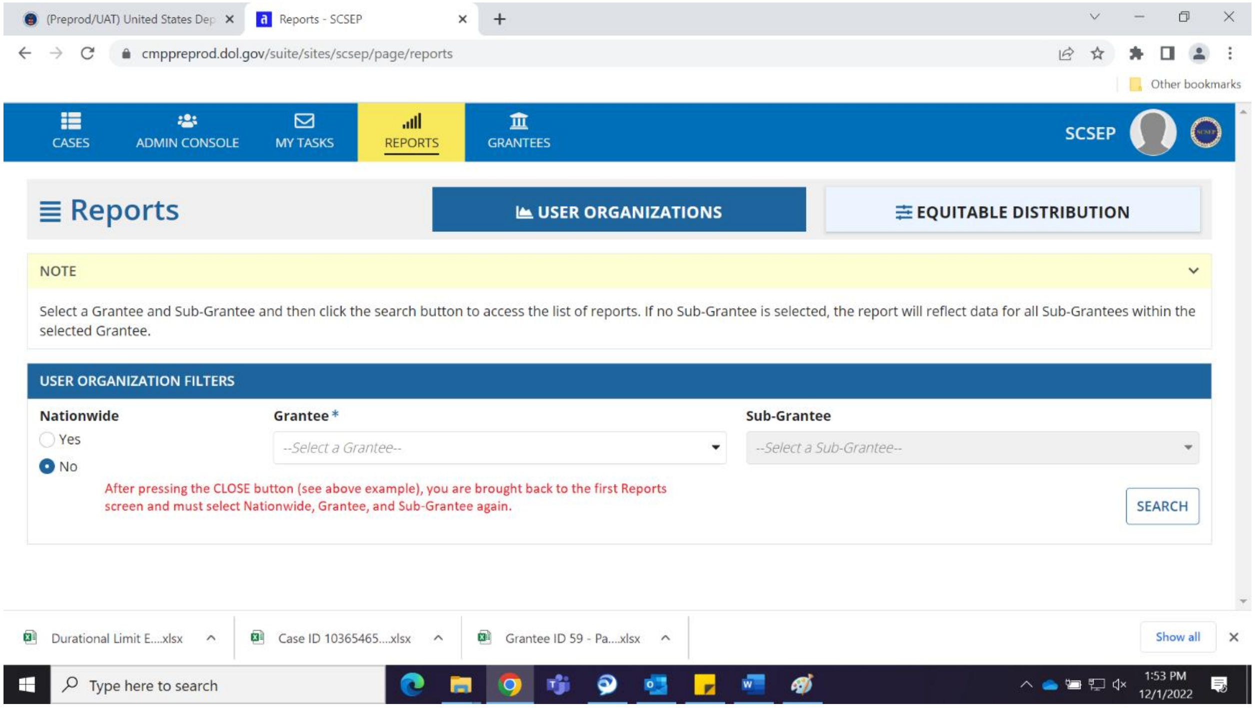


A	B	C	D	E	F
Time In Program	Case Manager	Enrollment Date	Days in Enrollment	County of Residence	Days Ever on Leave of
41	George Grantee Admins	8/20/2022	6	District of Columbia	21

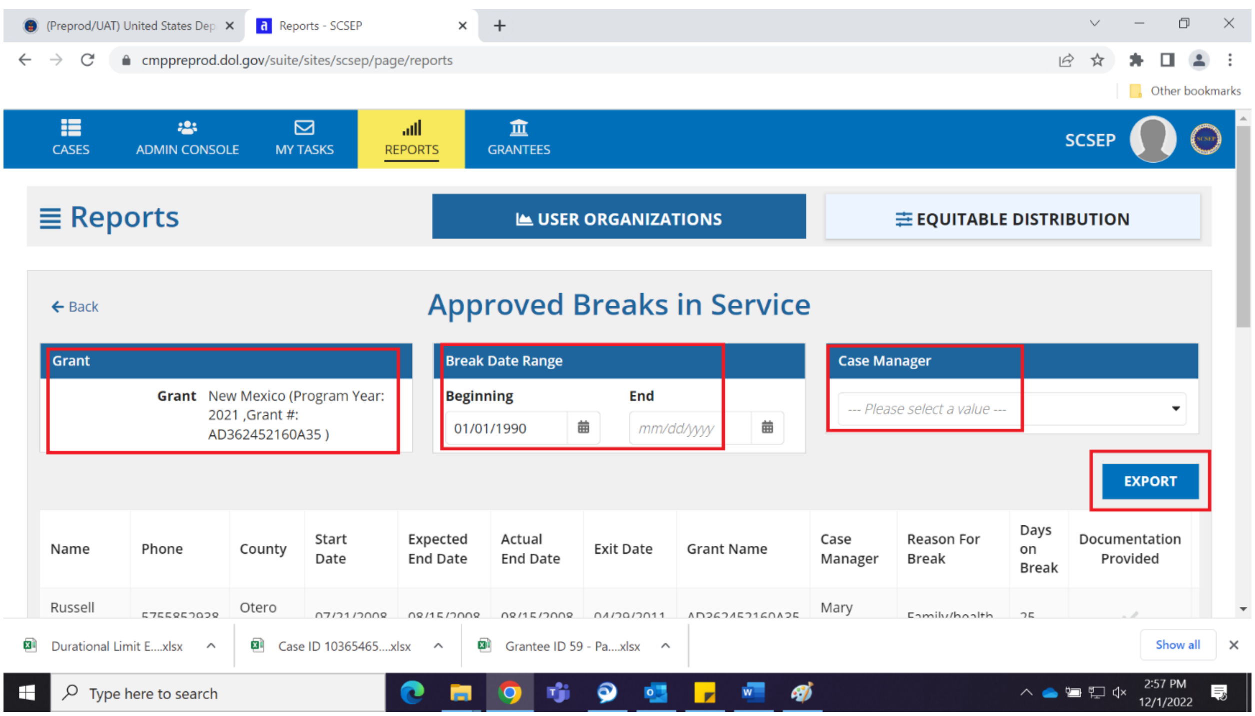
Once you have generated the report, you can either exit the Reports module entirely or generate more reports by clicking the **CLOSE** button.



Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.



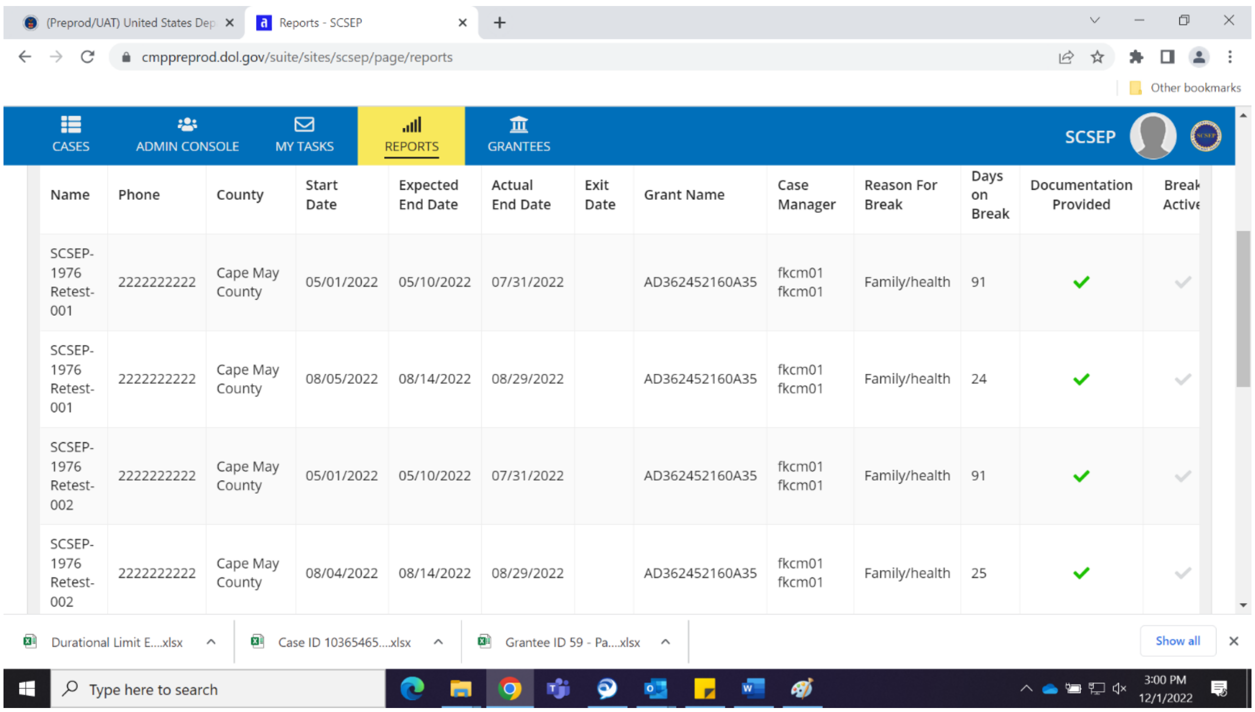
1.2 Approved Breaks in Service



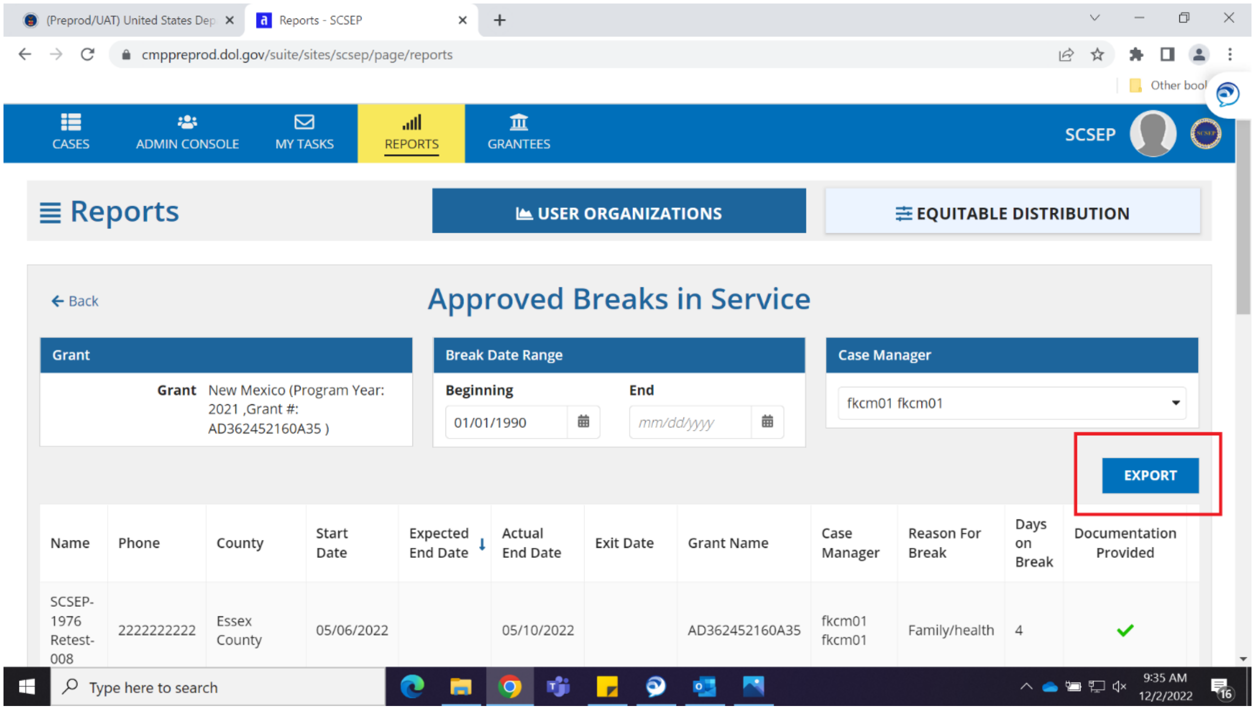
This report can be filtered by the following

- **Grant:** This field is prefilled based on the combination of Grantee and Sub-Grantee that you selected in the User Organization Filters screen.

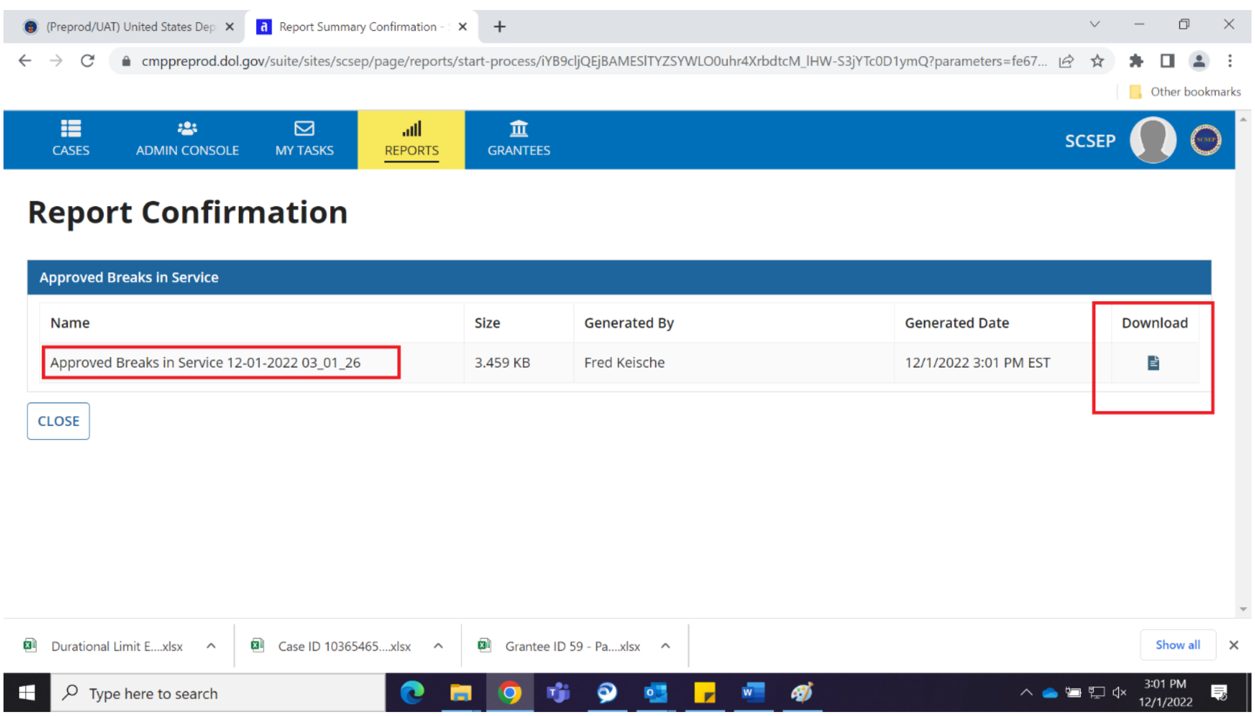
- **Break Date Range**: Select a beginning date (required) and ending date (optional) to help narrow the search. The beginning date is prefilled with 01/01/1990. A date can be entered by either typing it in using the MM/DD/YYYY format or by navigating to the desired date by clicking on the calendar icon to the right of the date fields.
- **Case Manager**: This dropdown displays the Case Managers associated with the Grantee/Sub-Grantee combination that you chose.



The bottom part of the screen shows those Participants who fall into your selected filter ranges. The results can be sorted by columns.

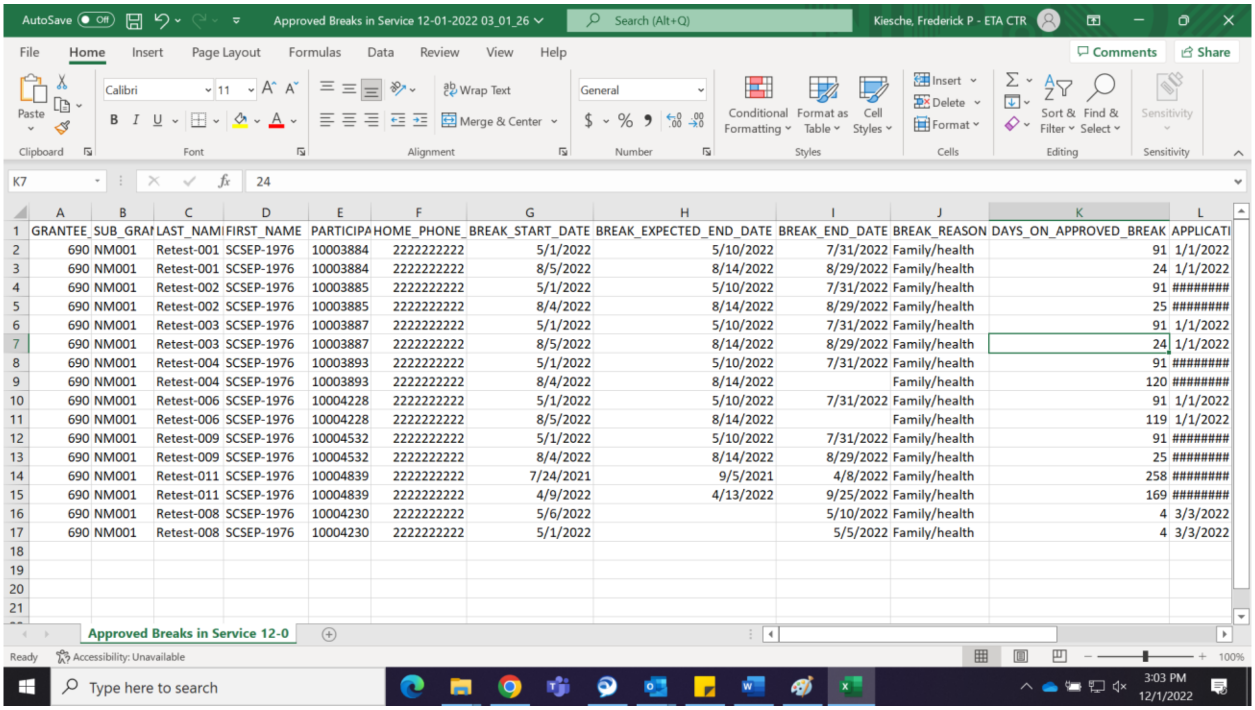


The Approved Breaks in Service that are found by your filter selection can be exported by clicking **EXPORT**.



When a file name appears on the Report Confirmation screen, click on the icon under the word **Download** to save a copy of the file to your default file location.

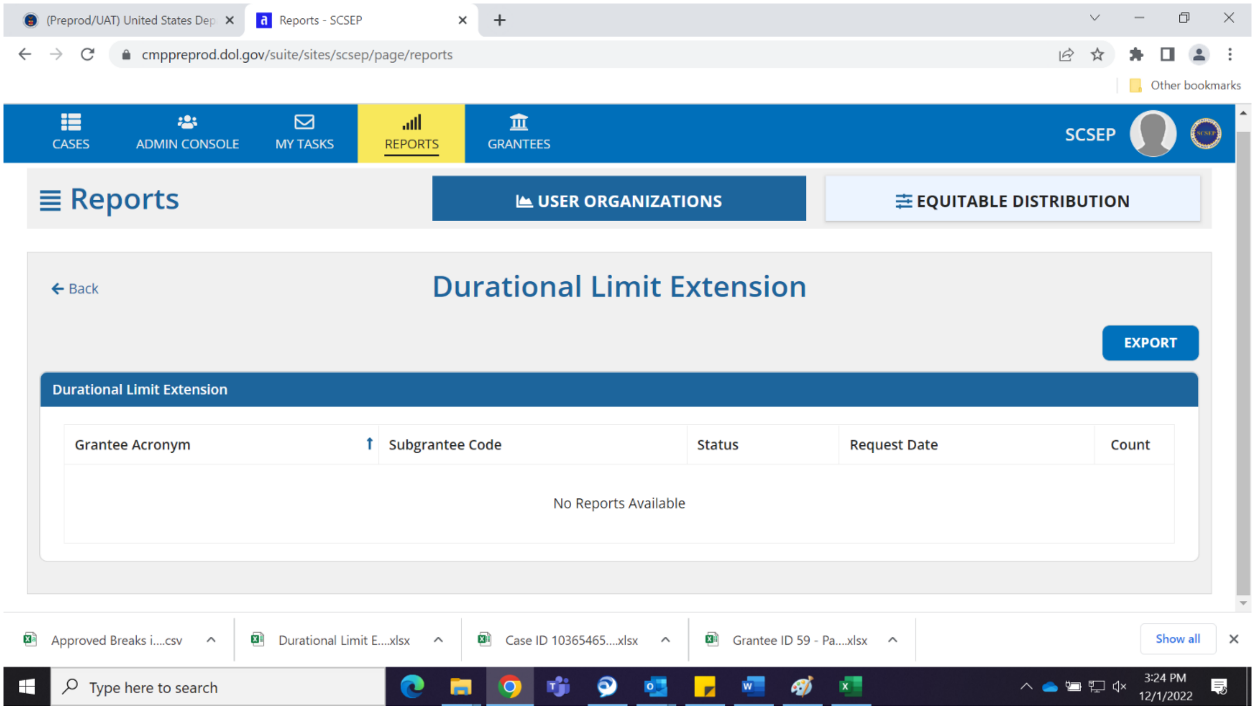
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



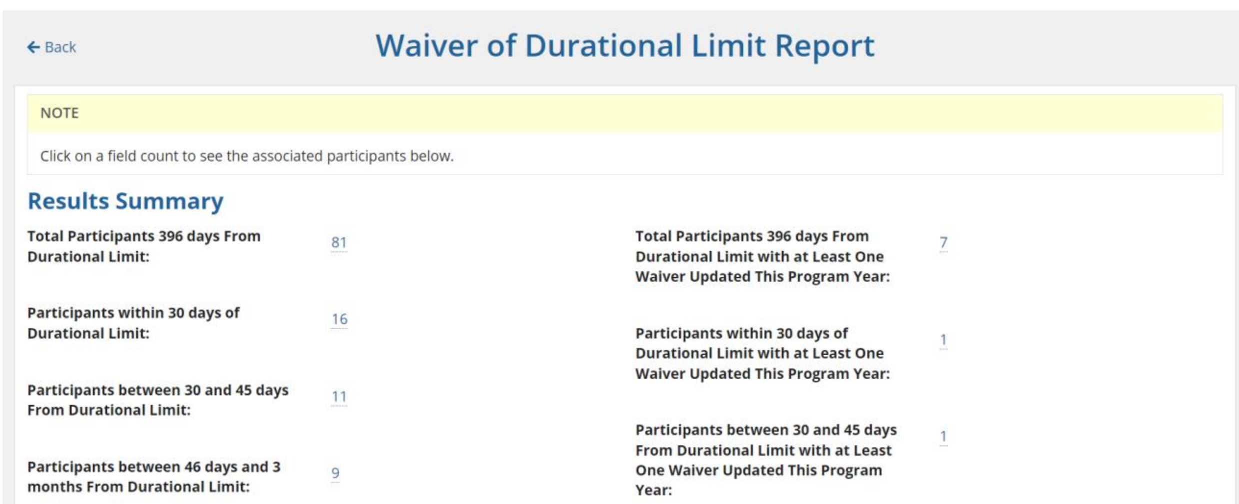
GRANTEE_	SUB_GRAI	LAST_NAMI	FIRST_NAME	PARTICIPA	HOME_PHONE_	BREAK_START_DATE	BREAK_EXPECTED_END_DATE	BREAK_END_DATE	BREAK_REASON	DAYS_ON_APPROVED_BREAK	APPLICATI
690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	########
690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	########
690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	########
690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	8/4/2022	8/14/2022		Family/health	120	########
690	NM001	Retest-006	SCSEP-1976	10004228	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-006	SCSEP-1976	10004228	2222222222	8/5/2022	8/14/2022		Family/health	119	1/1/2022
690	NM001	Retest-009	SCSEP-1976	10004532	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	########
690	NM001	Retest-009	SCSEP-1976	10004532	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	########
690	NM001	Retest-011	SCSEP-1976	10004839	2222222222	7/24/2021	9/5/2021	4/8/2022	Family/health	258	########
690	NM001	Retest-011	SCSEP-1976	10004839	2222222222	4/9/2022	4/13/2022	9/25/2022	Family/health	169	########
690	NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/6/2022		5/10/2022	Family/health	4	3/3/2022
690	NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/1/2022		5/5/2022	Family/health	4	3/3/2022

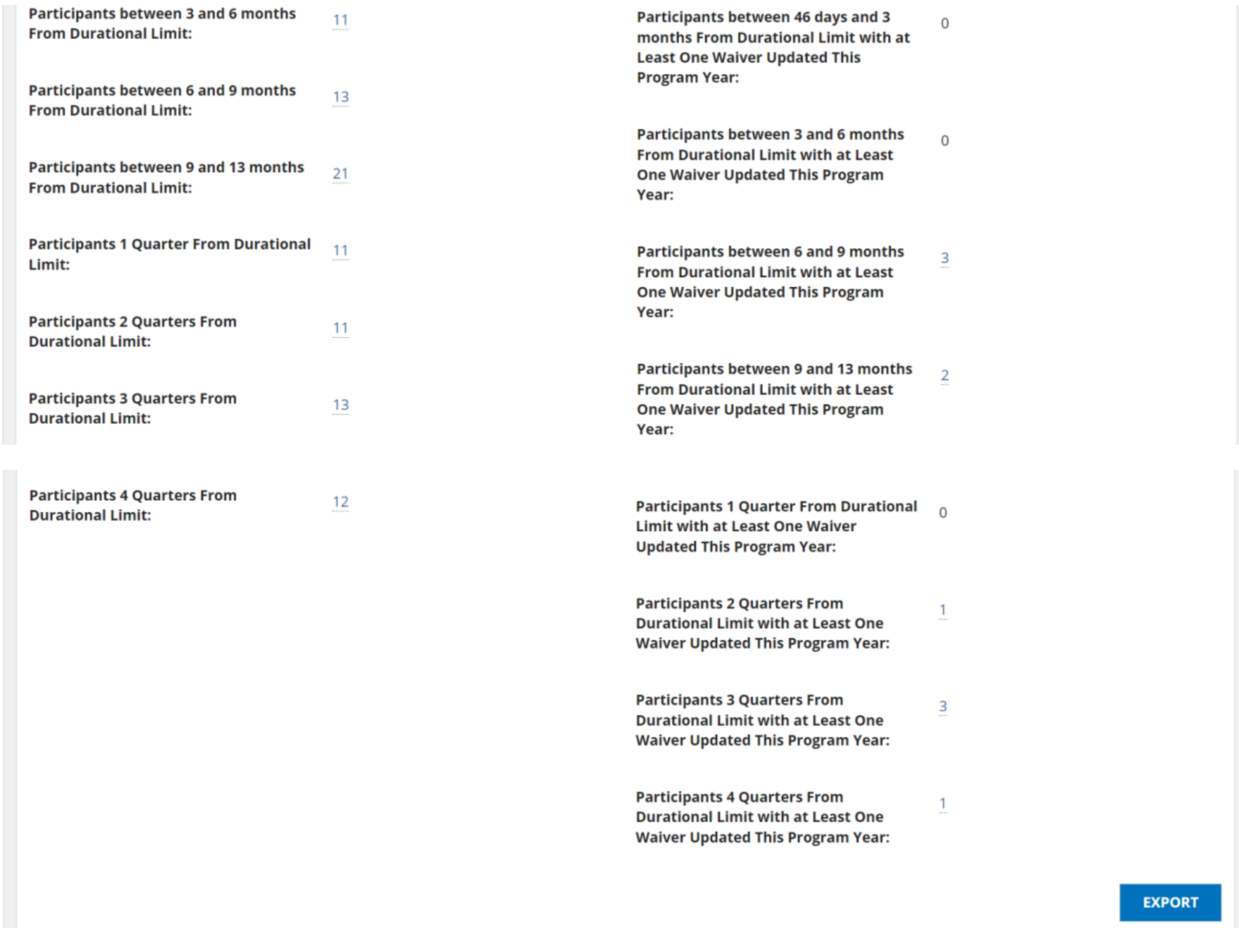
Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

1.3 Durational Limit Extension



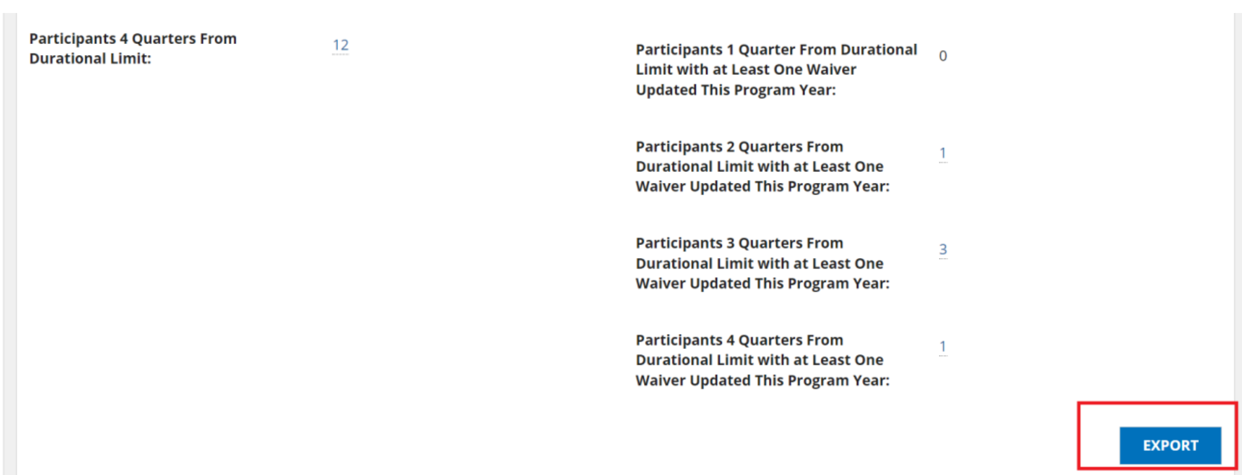
1.4 Waiver of Durational Limit Report



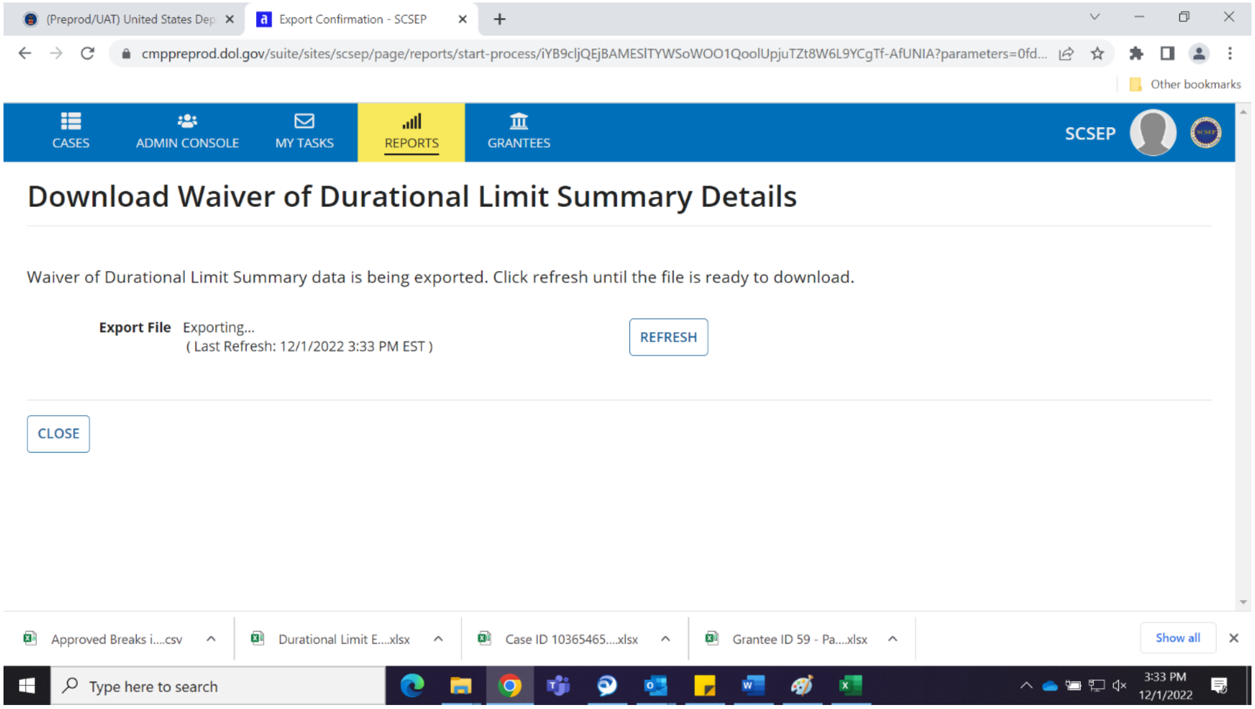


This report is generated based on the combination of Grantee and Sub-Grantee that you selected. For each category (for example Participants 1 Quarter From Durational Limit) you'll see a number (field count). Clicking on that number will display the details for those Participants matching the limit you have selected.

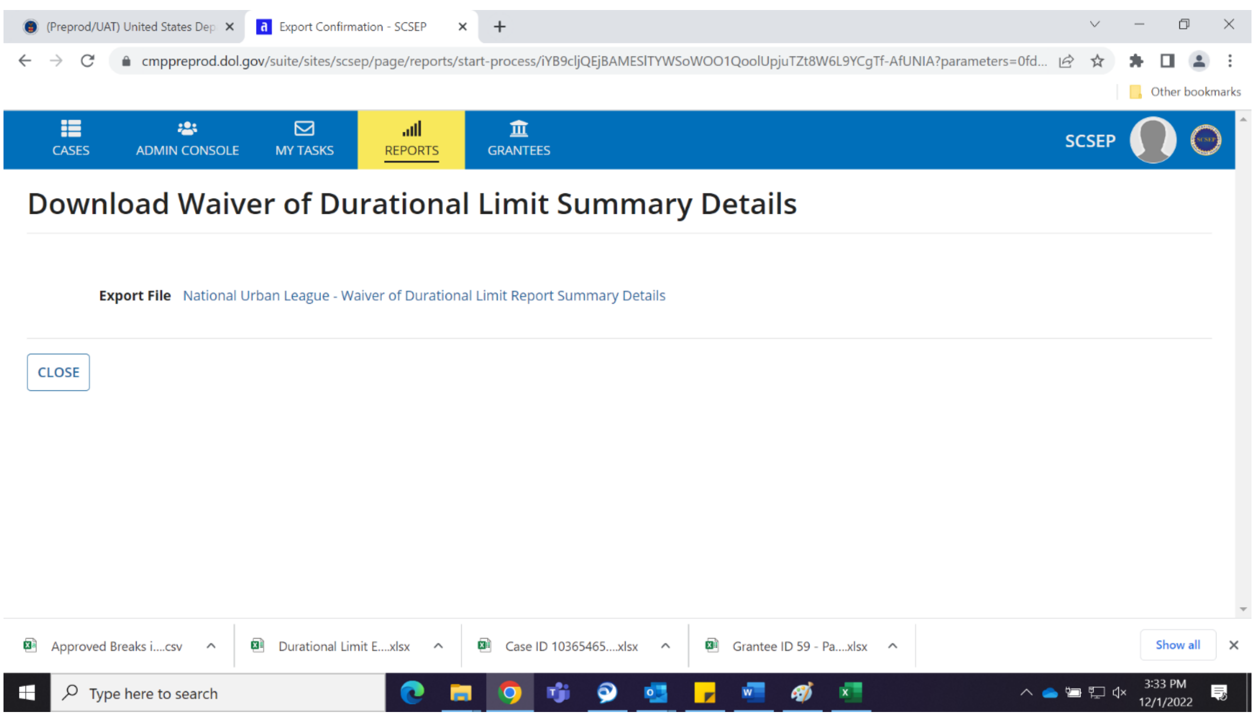
The aggregated results of this report can be exported by clicking **EXPORT**.



Click **REFRESH** until a file name appears next to **EXPORT File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.



The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

	A	B	C
1	Total_Participants_396_days_From_Durational_Limit	81	
2	Participants_within_30_days_of_Durational_Limit	16	
3	Participants_between_30_and_45_days_From_Durational_Limit	11	
4	Participants_between_46_days_and_3_months_From_Durational_Limit	9	
5	Participants_between_3_and_6_months_From_Durational_Limit	11	
6	Participants_between_6_and_9_months_From_Durational_Limit	13	
7	Participants_between_9_and_13_months_From_Durational_Limit	21	
8	Participants_1_Quarter_From_Durationa_Limit	11	
9	Participants_2_Quarters_From_Durational_Limit	11	
10	Participants_3_Quarters_From_Durational_Limit	13	
11	Participants_4_Quarters_From_Durational_Limit	12	
12	Total_Participants_396days_From_Durational_Limit_with_atLeast_One_Waiver_Updated_This_ProgramYear	7	
13	Participants_Within_30days_From_Durational_Limit_with_atLeast_OneWaiver_Updated_This_ProgramYear	1	
14	Participants_Between_30_and_45days_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	1	
15	Participants_Between_46days_and_3Months_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	0	
16	Participants_Between_3and6Months_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	0	
17	Participants_Between_6and9Months_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	3	
18	Participants_Between_9and13Months_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	2	
19	Participants_1_Quarter_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	0	
20	Participants_2_Quarters_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	1	
21	Participants_3_Quarters_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	3	
22	Participants_4_Quarters_From_Durational_Limit_with_atLeast_OneWaiver_Updated_ThisProgramYear	1	
23			
24			
25			
26			

Click on any of the numbers in the Results Summary in order to generate a Participant Table based on that particular metric.

NOTE

Click on a field count to see the associated participants below.

Results Summary

Total Participants 396 days From Durational Limit: 81

Participants for your selected Grantee and Sub-Grantee combination that fit the metric will be displayed in the Participant Table. The table can be sorted when you click on a column name, e.g., Participant. Clicking on the icon to the right of the Sub-Grantee column will generate Participant Details.

Participant Table: 396 Days From Durational Limit

	Sub Grantee	Days Left	Participant	Participant ID	Home Phone Number	County of Residence	Application Date	Enrollment Date	Date Expected to Reach Durational Limit	Termination Letter Due Date
≡	SCSEP - New Mexico	327	Cross, J. Kelly	9972376	5053532242	Valencia County	05/25/2019	06/07/2019	06/05/2024	05/06/2024
≡	SCSEP - New Mexico	26	Duckworth, David	9953790	5054027258	San Juan County	03/07/2018	06/04/2018	08/09/2023	07/10/2023
≡	SCSEP - New Mexico	205	Ford, Jamie	9963781	5053574628	Valencia County	12/06/2018	12/21/2018	02/04/2024	01/05/2024
≡	SCSEP - New Mexico	43	LaCour-Johnson, Carmen	9958714	5053061561	Bernalillo County	06/26/2018	08/27/2018	08/26/2023	07/27/2023

The results of the Participant Table can be exported by clicking on **EXPORT**.

Participant Table: 396 Days From Durational Limit

	Sub Grantee	Days Left	Participant	Participant ID	Home Phone Number	County of Residence	Application Date	Enrollment Date	Date Expected to Reach Durational Limit	Termination Letter Due Date
≡	SCSEP - New Mexico	327	Cross, J. Kelly	9972376	5053532242	Valencia County	05/25/2019	06/07/2019	06/05/2024	05/06/2024

81 – 81 of 81

EXPORT

Click **REFRESH** until a file name appears next to **EXPORT File** on the screen.

Download Waiver of Durational Limit Participant Details

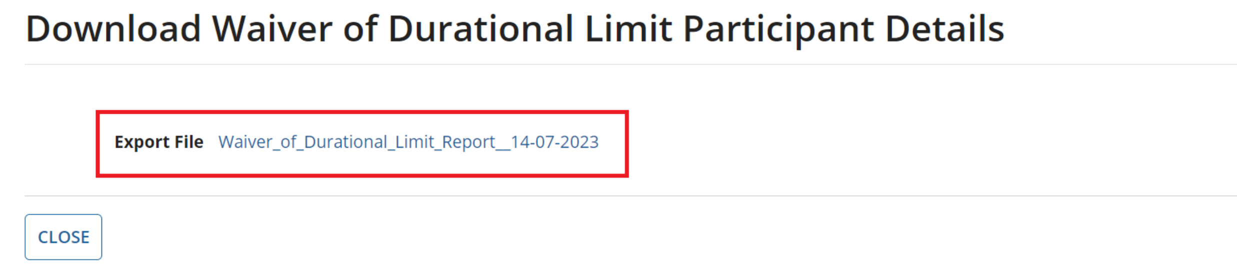
Waiver of Durational Limit Participant data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
(Last Refresh: 7/14/2023 2:41 PM EDT)

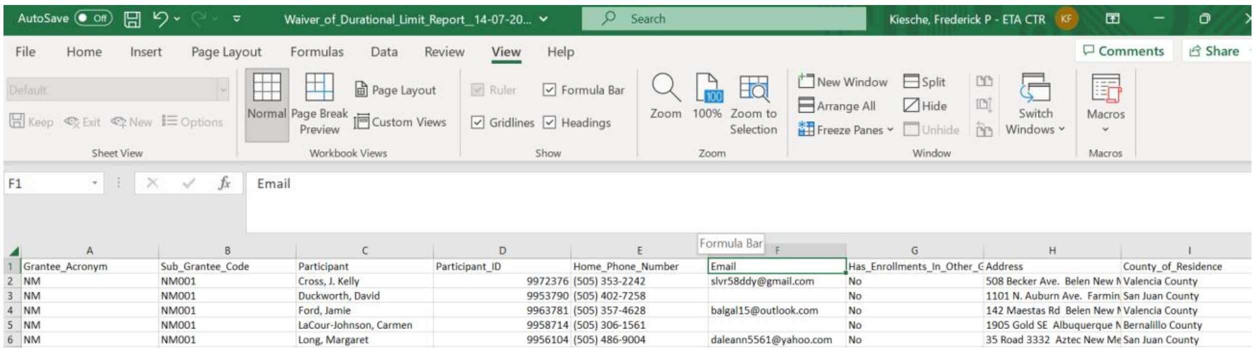
REFRESH

CLOSE

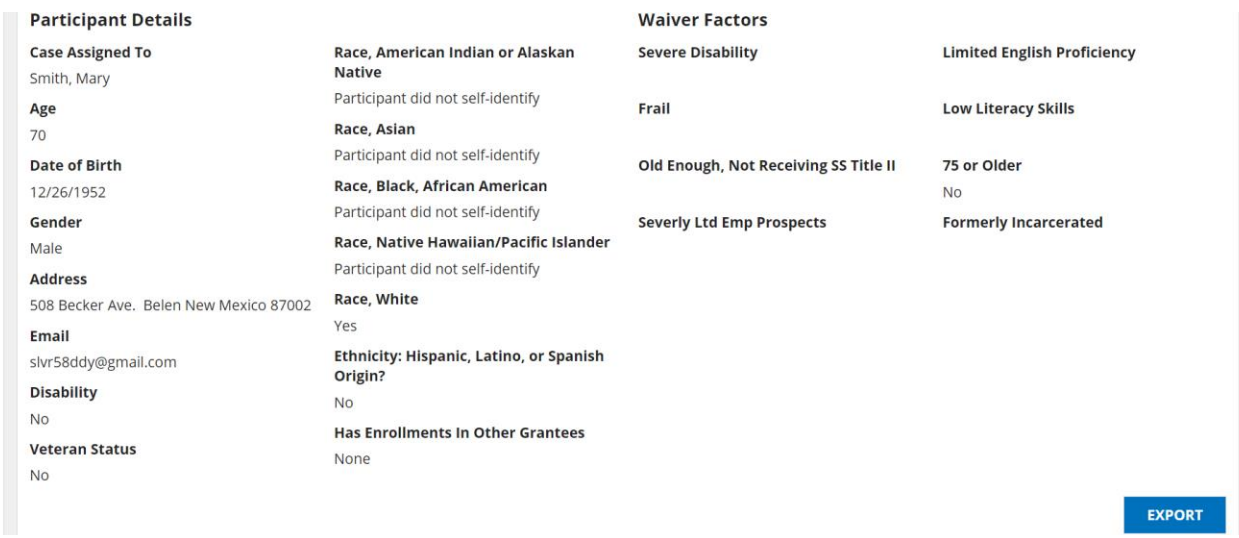
Click on the file name or right click on the file name to download a copy of the file to your default file location.



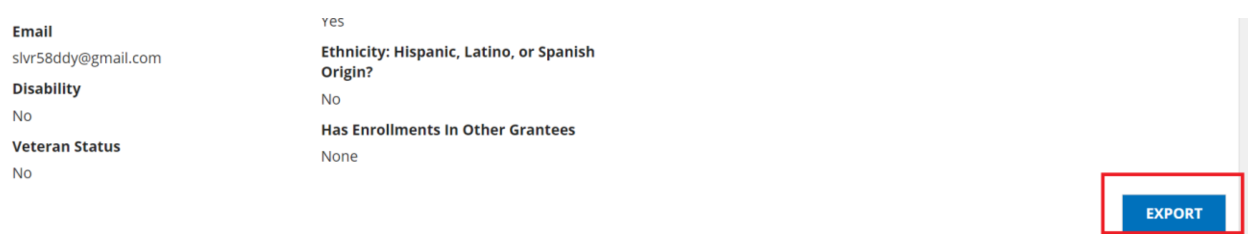
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



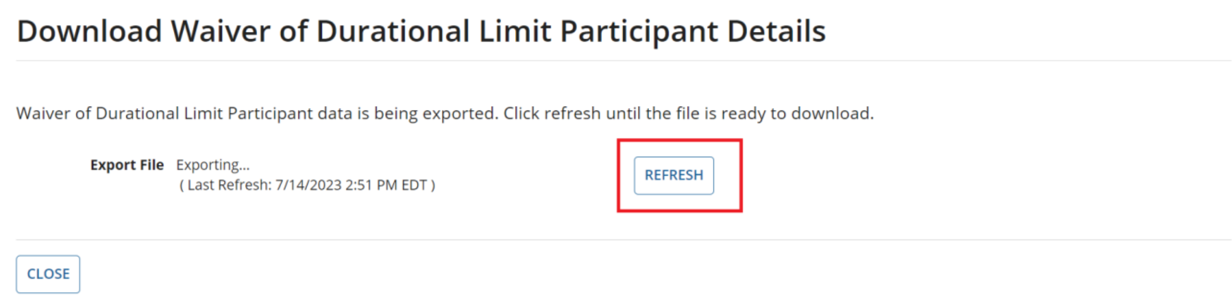
If you click on the icon on the left of a row in the Participant Table, a Participant Details report will be generated.



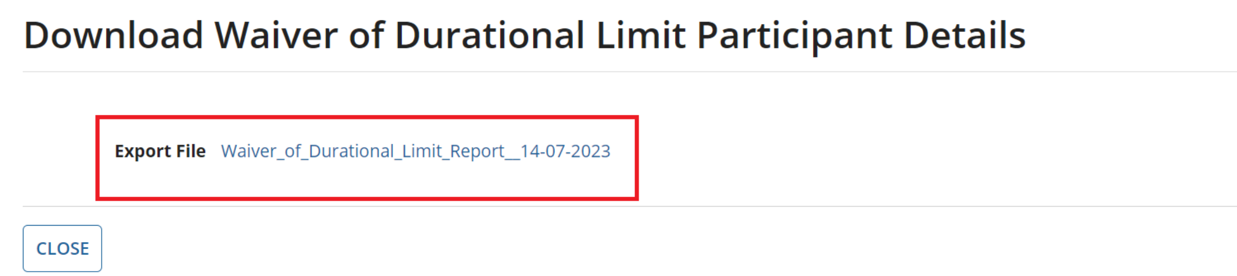
The results of the Participant Details can be exported by clicking on **EXPORT**.



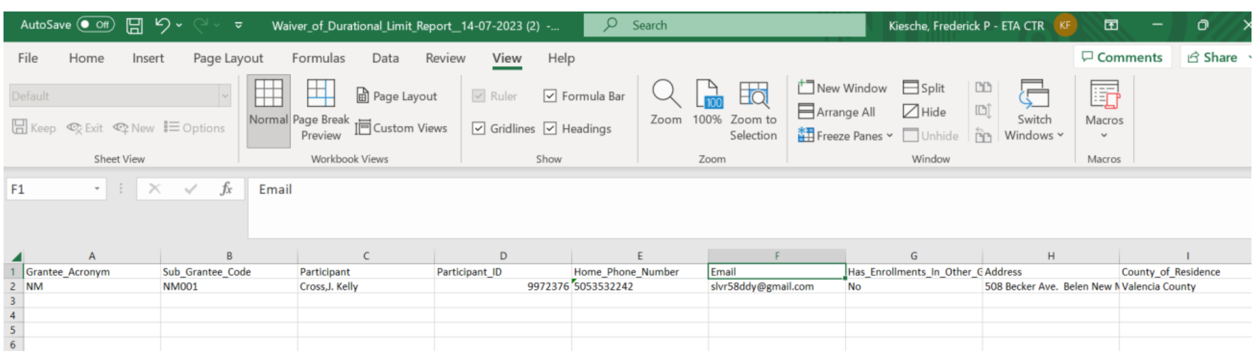
Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.



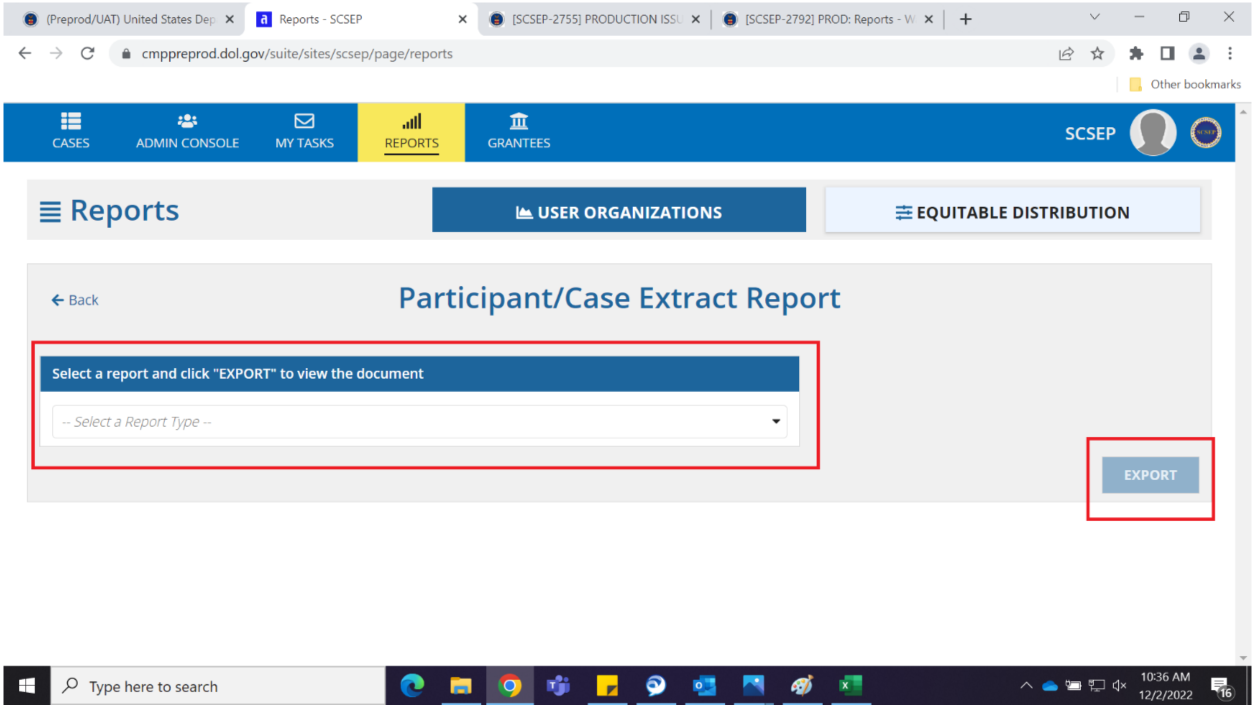
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

PENDING ADDITIONAL EXPORT SECTION ON FIELD COUNT BREAKDOWN.

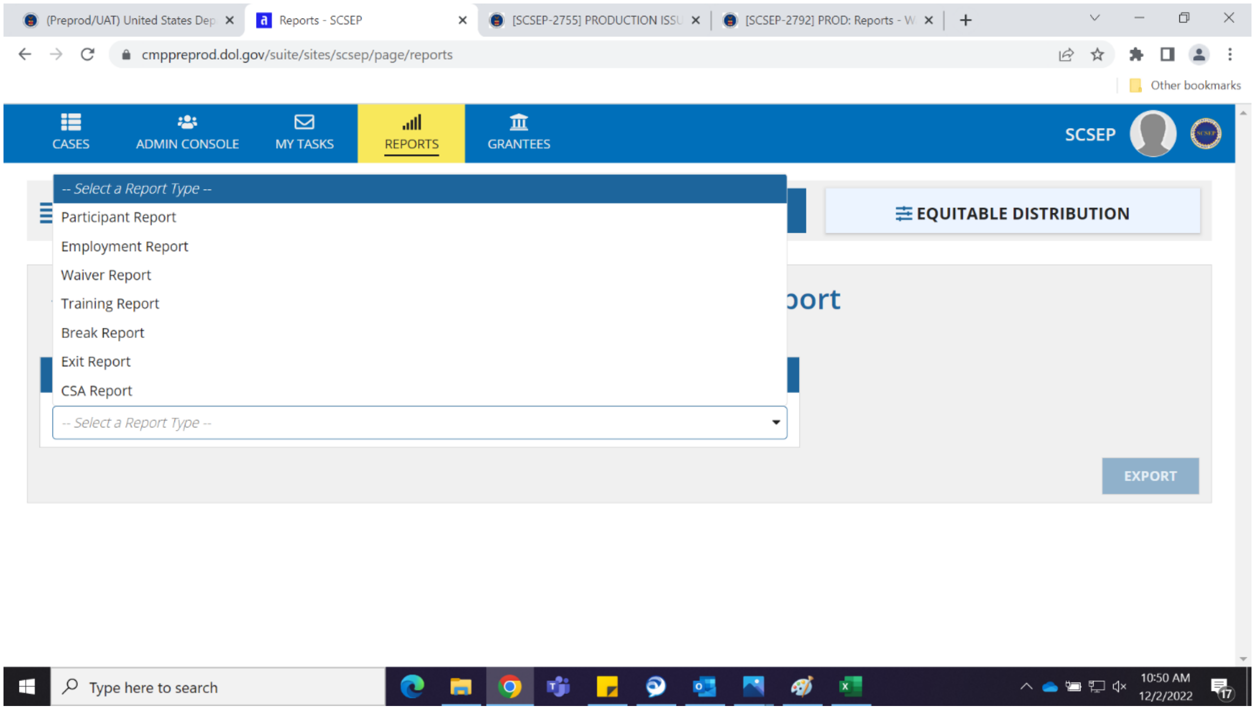
1.5 Participant/Case Extract Report



This report is available at the Grantee Admin or Program Analyst levels only.

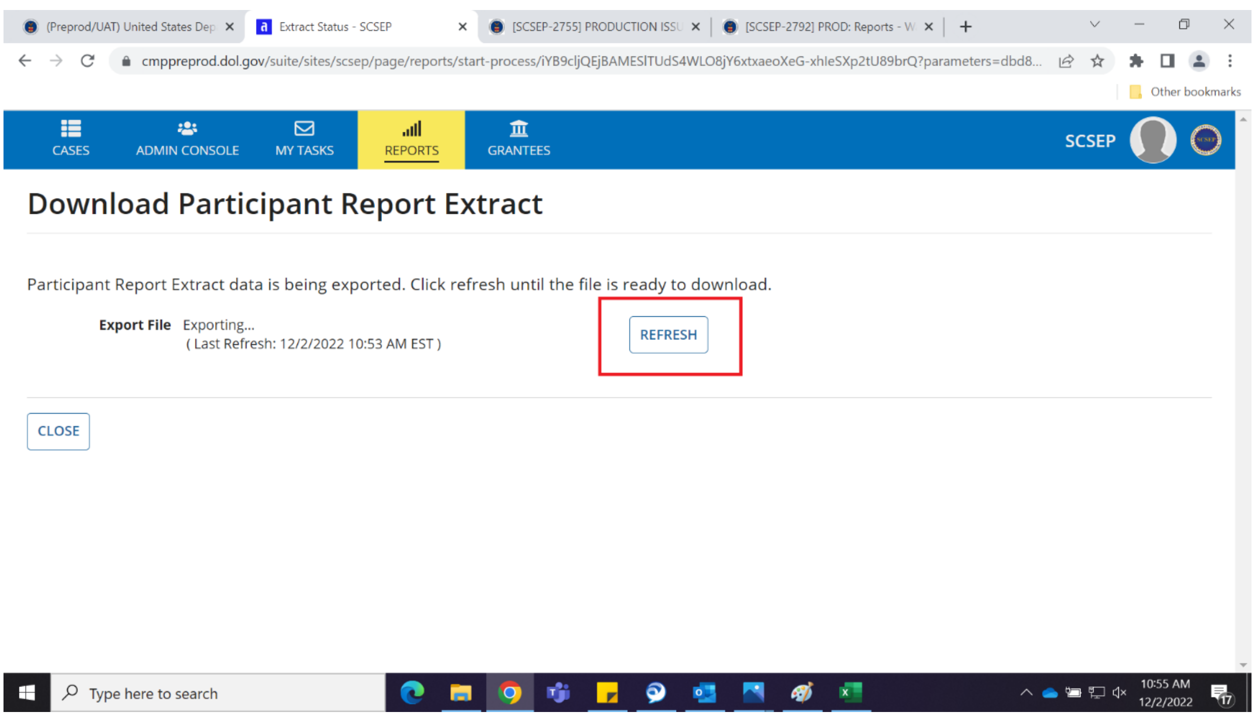
This report is actually several reports which can be chosen by selecting from the list that appears in the dropdown on the screen. You can select from among the following reports:

- Participant Report
- Waiver Report
- Break Report

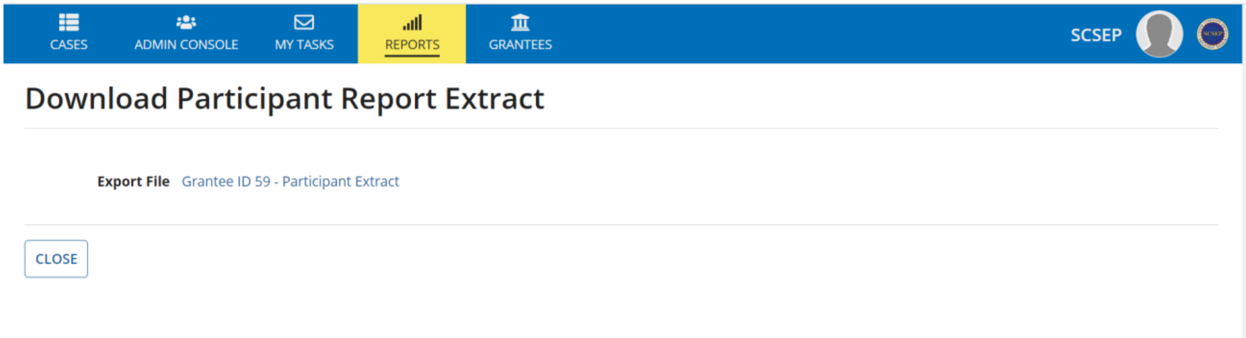


Once you have selected the report you wish, you will be able to generate the report by selecting the **EXPORT** button. For this example, we'll show the Participant Report.

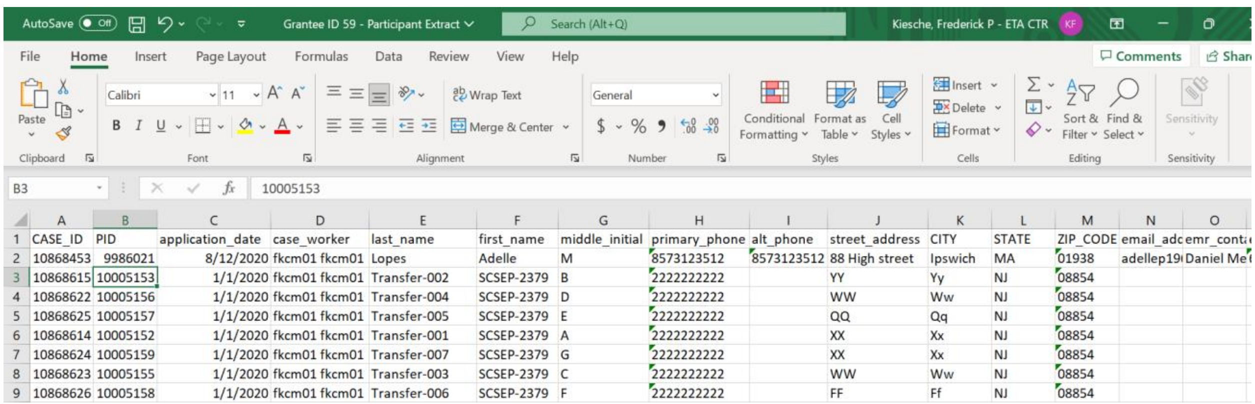
Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.



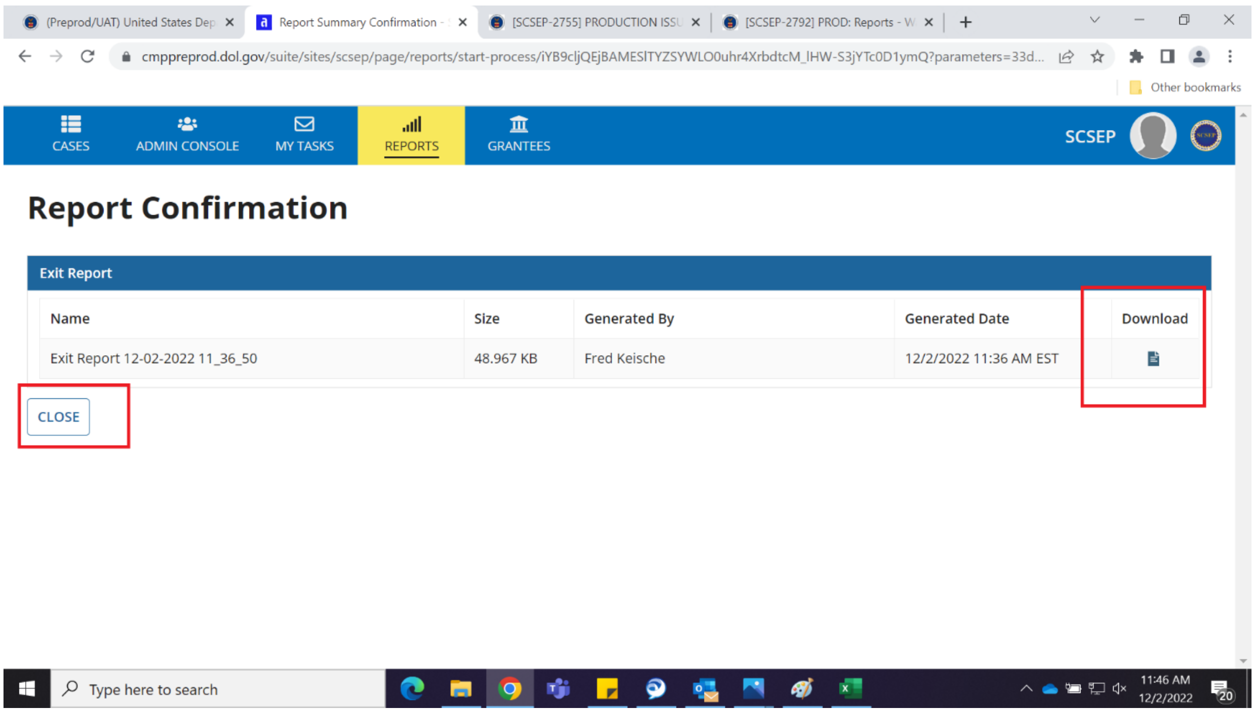
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	CASE_ID	PID	application_date	case_worker	last_name	first_name	middle_initial	primary_phone	alt_phone	street_address	CITY	STATE	ZIP_CODE	email_adc	emr_conta
2	10868453	9986021	8/12/2020	fkcm01 fkcm01	Lopes	Adelle	M	8573123512	8573123512	88 High street	Ipswich	MA	01938	adellep19	Daniel Me
3	10868615	10005153	1/1/2020	fkcm01 fkcm01	Transfer-002	SCSEP-2379	B	2222222222		YY	Yy	NJ	08854		
4	10868622	10005156	1/1/2020	fkcm01 fkcm01	Transfer-004	SCSEP-2379	D	2222222222		WW	Ww	NJ	08854		
5	10868625	10005157	1/1/2020	fkcm01 fkcm01	Transfer-005	SCSEP-2379	E	2222222222		QQ	Qq	NJ	08854		
6	10868614	10005152	1/1/2020	fkcm01 fkcm01	Transfer-001	SCSEP-2379	A	2222222222		XX	Xx	NJ	08854		
7	10868624	10005159	1/1/2020	fkcm01 fkcm01	Transfer-007	SCSEP-2379	G	2222222222		XX	Xx	NJ	08854		
8	10868623	10005155	1/1/2020	fkcm01 fkcm01	Transfer-003	SCSEP-2379	C	2222222222		WW	Ww	NJ	08854		
9	10868626	10005158	1/1/2020	fkcm01 fkcm01	Transfer-006	SCSEP-2379	F	2222222222		FF	Ff	NJ	08854		

This is the procedure that you follow, in general, for each of the reports. The Participant Report, the Waiver Report, the Break Report, all require you to download the generated file by clicking on the name, as shown above.

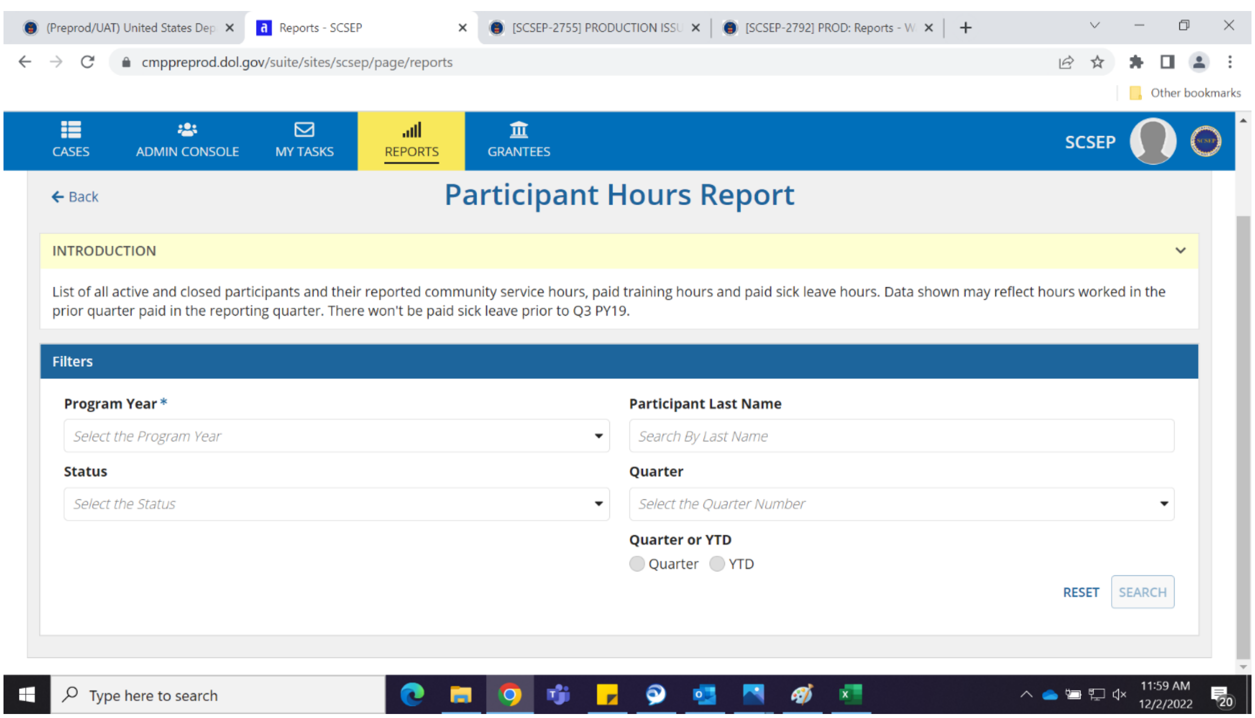
Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.



The Employment Report, the Training Report, the Exit Report and the CSA Report all require you to download the generated file by clicking on the icon under the word **Download** to save a copy of the file to your default file location.

For either download method, once you have downloaded the report, clicking the **CLOSE** button will bring you back to the initial Reports tab screen.

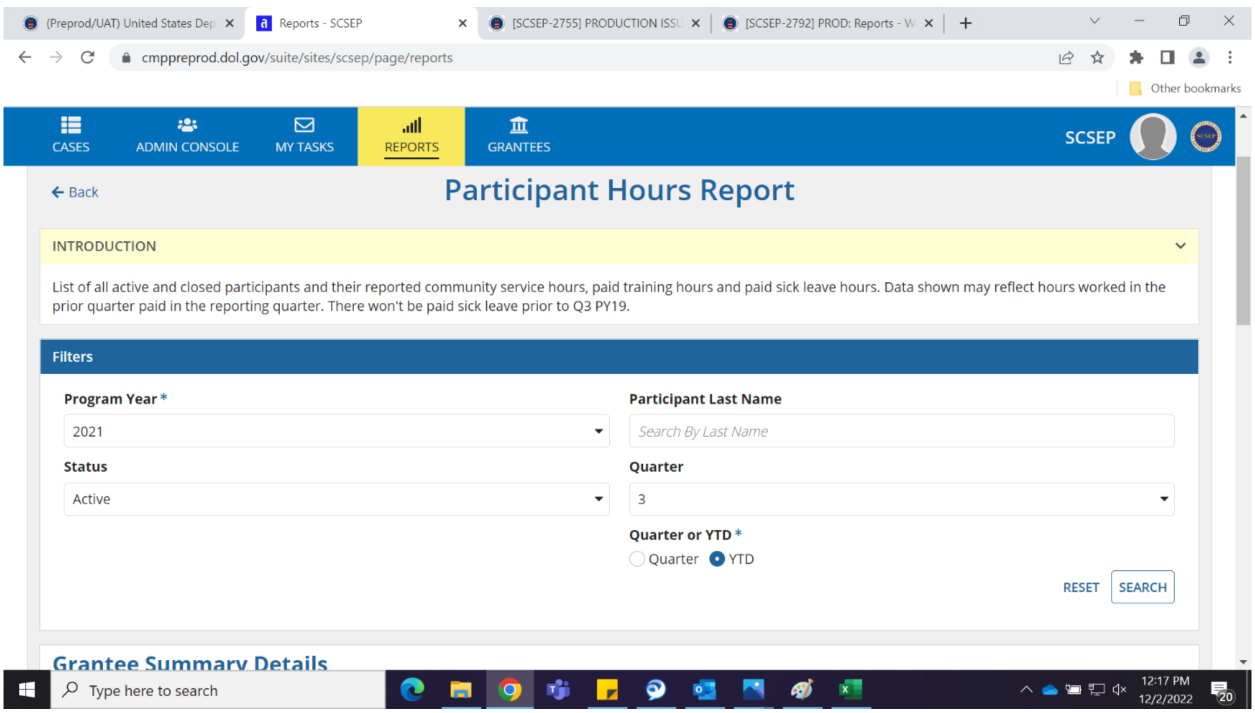
1.6 Participant Hours Report



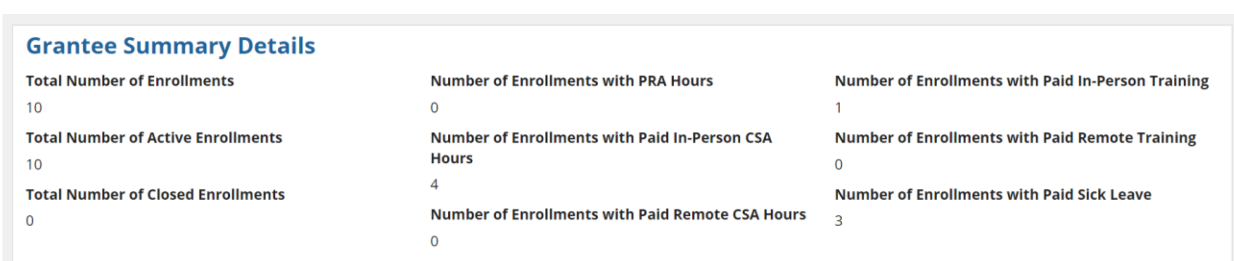
This report can be filtered by the following

- **Program Year**: You can select individual years from 2010 to the current year. This is the only required filter that must be selected.
- **Status**: You can select either Active or Exited – Closed for Participant status.
- **Participant Last Name**: Enter all or part of a last name to filter on this.
- **Quarter**: Select 1-4 for the first through fourth quarter of a Program Year.
- **Quarter or YTD**: Select one of these radio buttons in order to refine the results to be a specified result (Quarter) or a aggregated result (YTD). These buttons are inactive unless you have first selected a Quarter (see above).

Clicking **Reset** will clear the values for the filters.



Choose desired filters and click **SEARCH**.



The screen will display aggregate results for the Grantee/Sub-Grantee you have chosen and display them under Grantee Summary Details, Grantee Summary Hours Table and in the Participant Table. Scroll down to see all these screens.

Grantee Summary Hours Table

Quarter	Total PRA Activities Hours	Total Paid In-Person CSA Hours	Total Paid Remote CSA Hours	Total Paid In-Person Training Hours	Total Paid Remote Training Hours	Total Paid Sick Leave Hours
Q1	0	105	0	54	0	78
Q2	0	415	0	148	0	302
Q3	0	617	0	4	0	92
Q4	0	0	0	0	0	0

EXPORT

Grantee Summary Hours Table will show totals by Quarter for various categories: Total PRA Activities Hours, Total Paid In-Person CSA Hours, etc.

The aggregated results of this report can be exported by clicking **EXPORT**.

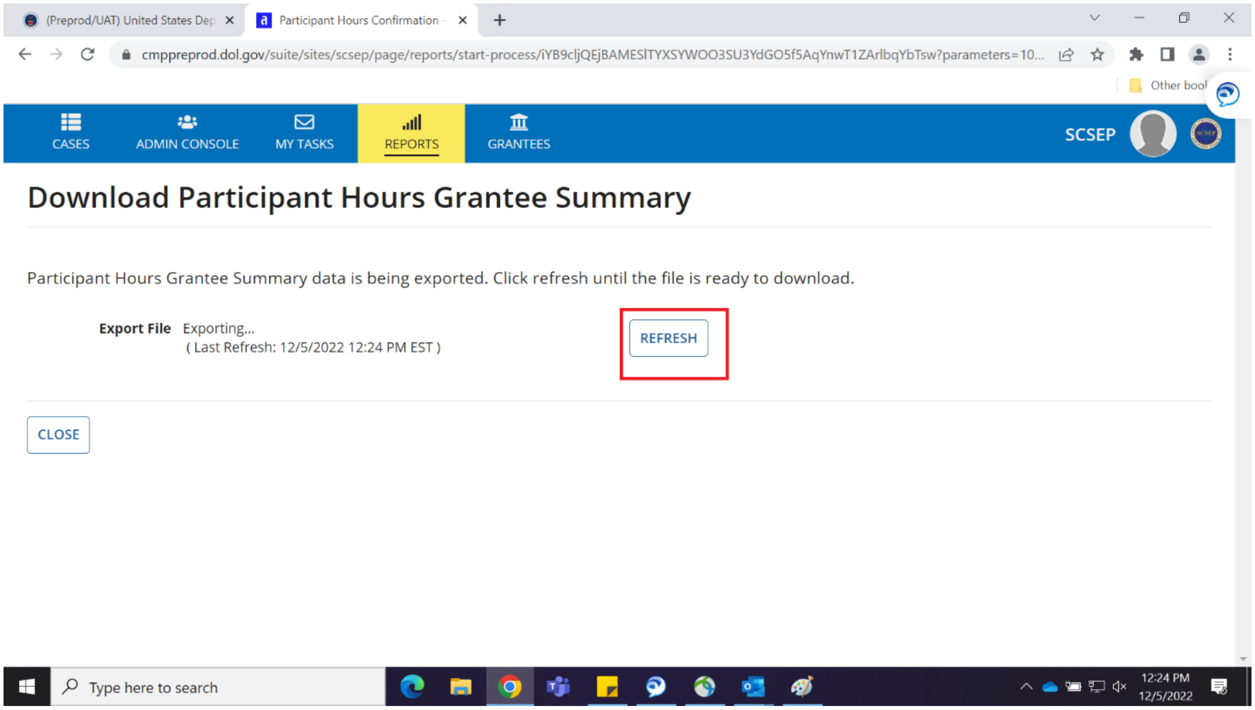
Grantee Summary Hours Table

Quarter	Total PRA Activities Hours	Total Paid In-Person CSA Hours	Total Paid Remote CSA Hours	Total Paid In-Person Training Hours	Total Paid Remote Training Hours	Total Paid Sick Leave Hours
Q1	0	105	0	54	0	78
Q2	0	415	0	148	0	302
Q3	0	617	0	4	0	92
Q4	0	2019	0	0	0	50

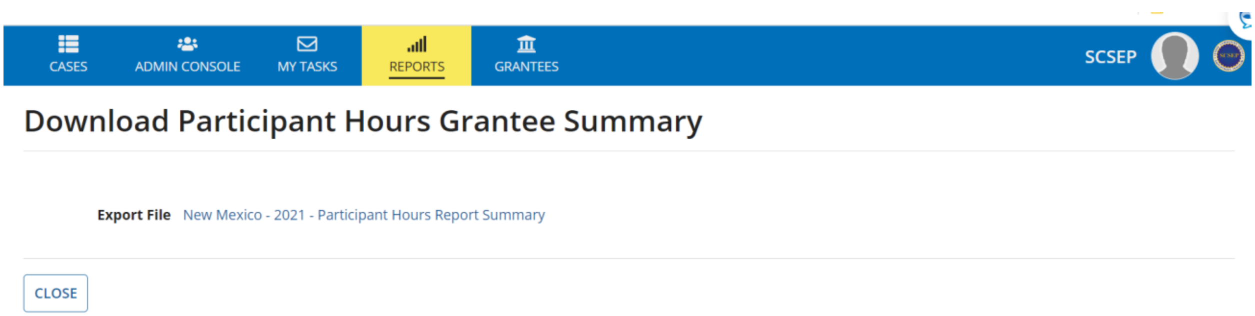
EXPORT

Participant Table

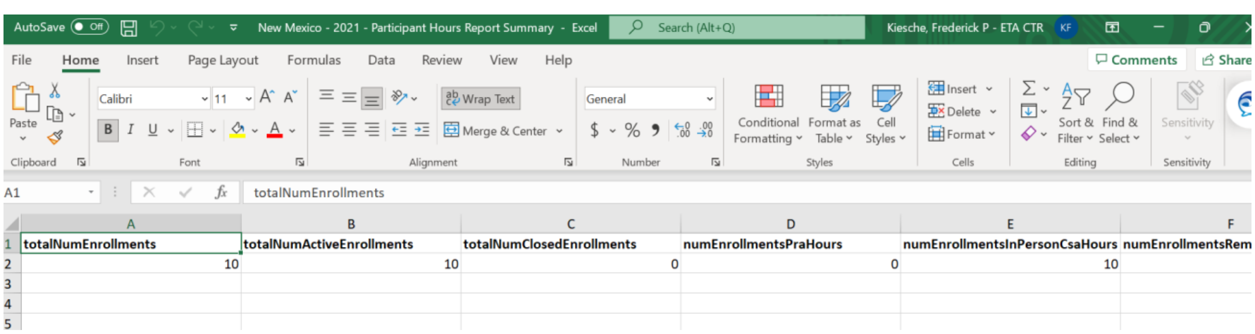
Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.



The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

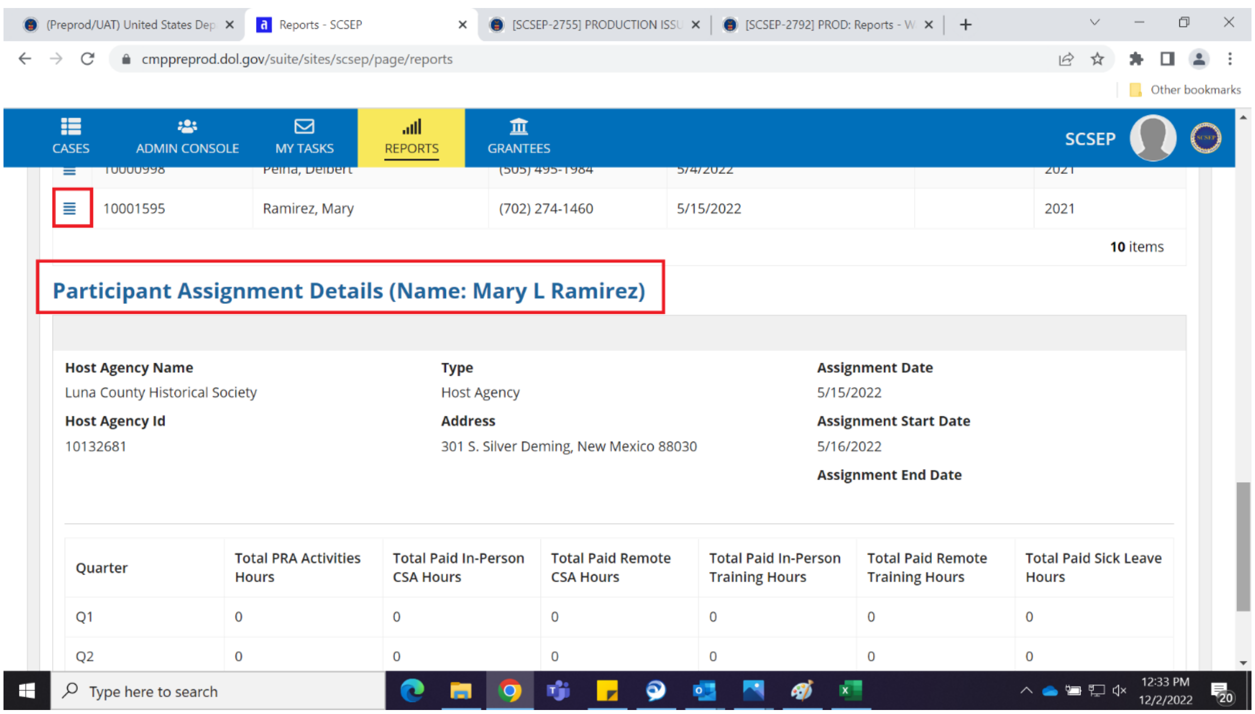


The Participant Table shows information by individual Participant.

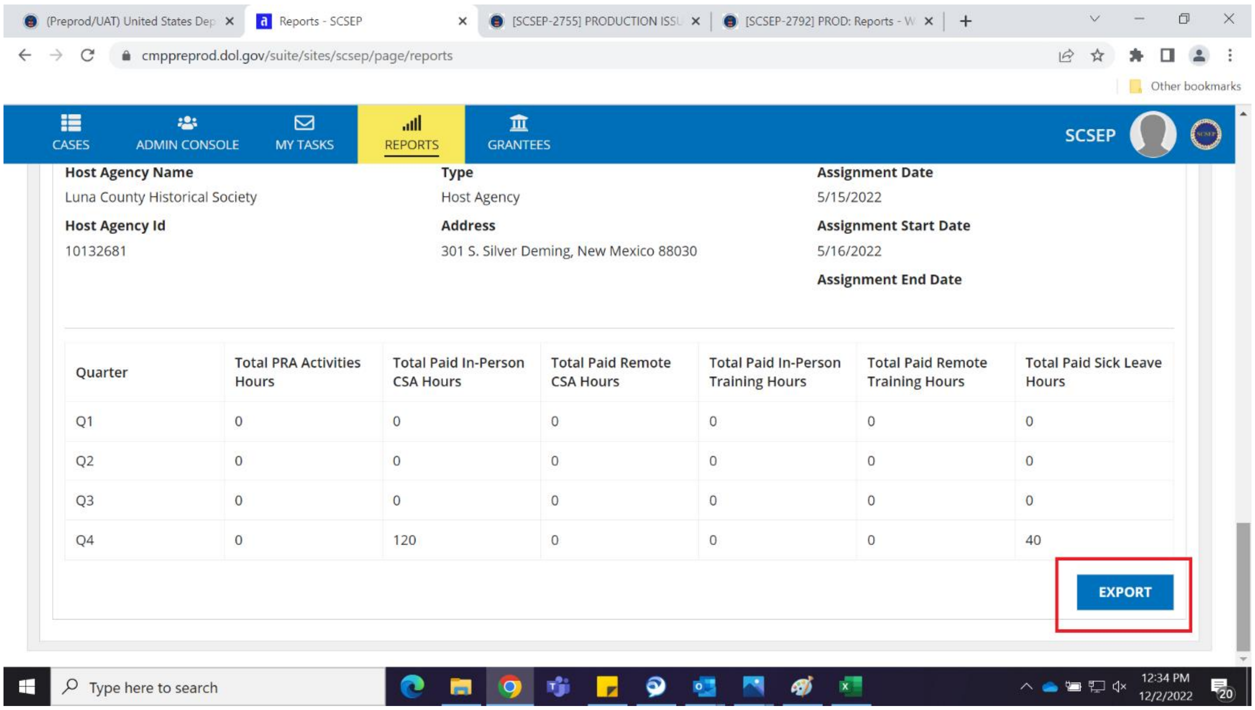
Participant Table

	Participant Id	Participant Name	Contact Number	Initial Assignment Date	Exit Date	Program Year
≣	9986694	Aldridge, Ronald	(907) 203-0020	2/3/2022		2021
≣	9995083	Anderson, Caitlin	(505) 507-2741	9/17/2021		2021
≣	9994791	Braze, Charles	(303) 263-1523	10/4/2021		2021
≣	9999697	Clark, Torey	(505) 360-4322	4/1/2022		2021
≣	9953790	Duckworth, David	(505) 402-7258	4/20/2022		2021
≣	9986368	Flores, Charlene	(505) 328-3832	3/31/2022		2021
≣	9979112	Fuentes-Sommer, Laura	(505) 270-5858	9/9/2021		2021

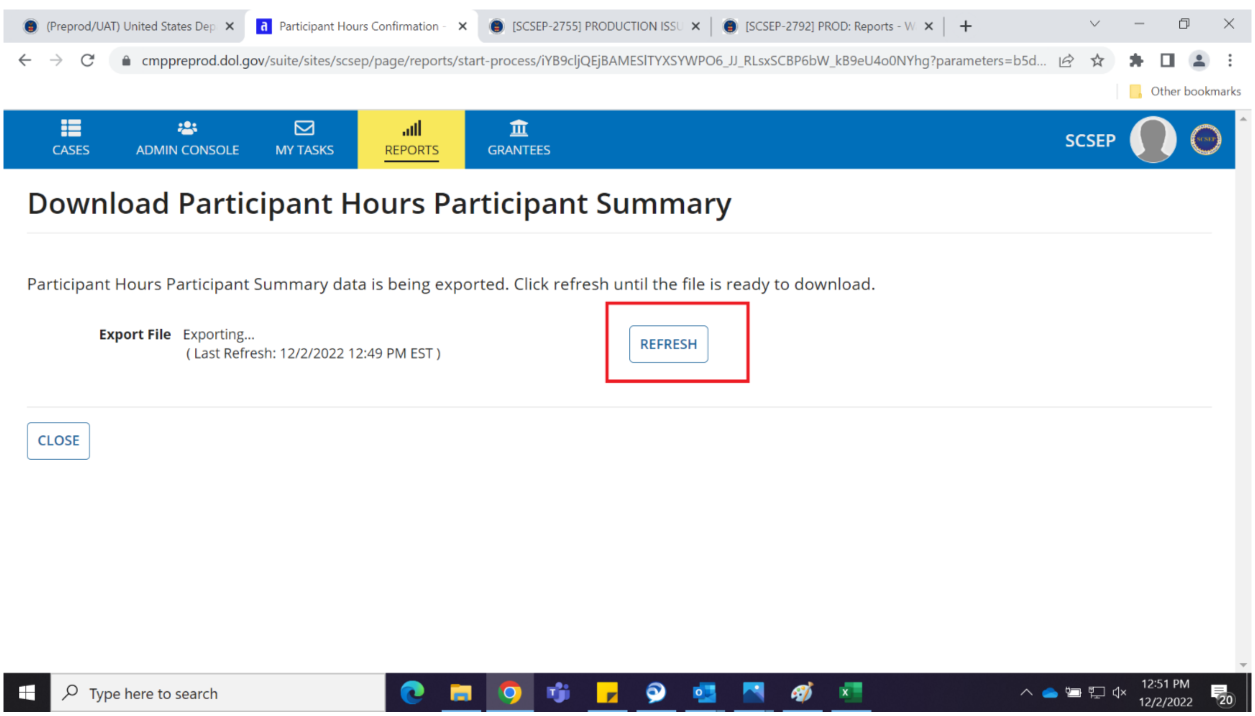
To view an individual Participant's report, click on the icon next to the Participant ID. The screen will refresh and the individual Participant's report will be visible at the bottom of the screen (you may have to scroll down).



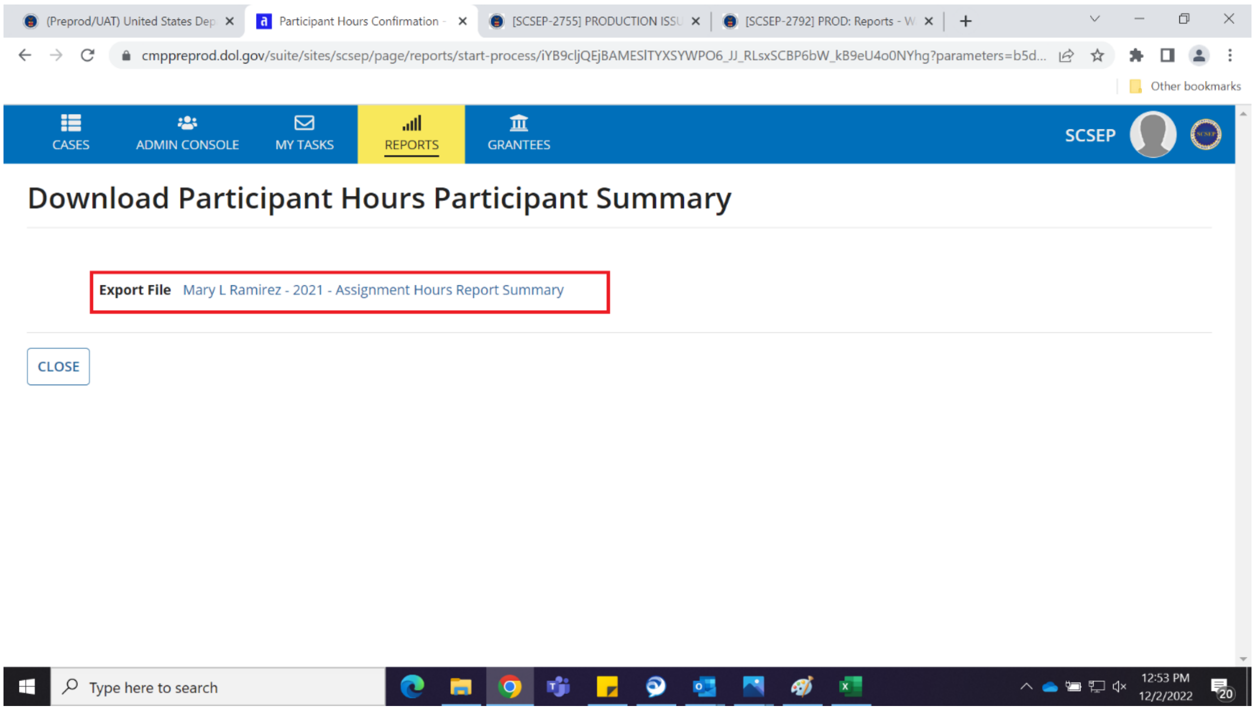
The Participant's report can be exported by clicking **EXPORT**.



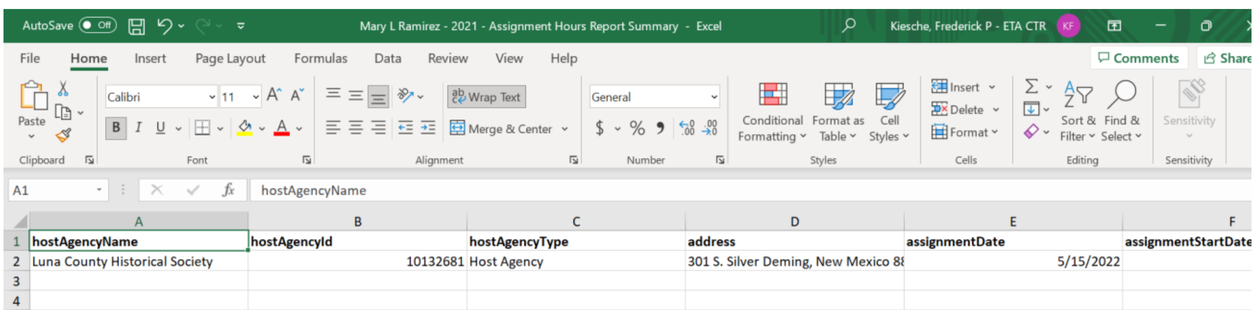
Click **REFRESH** until a file name appears next to **Export File** on the screen.



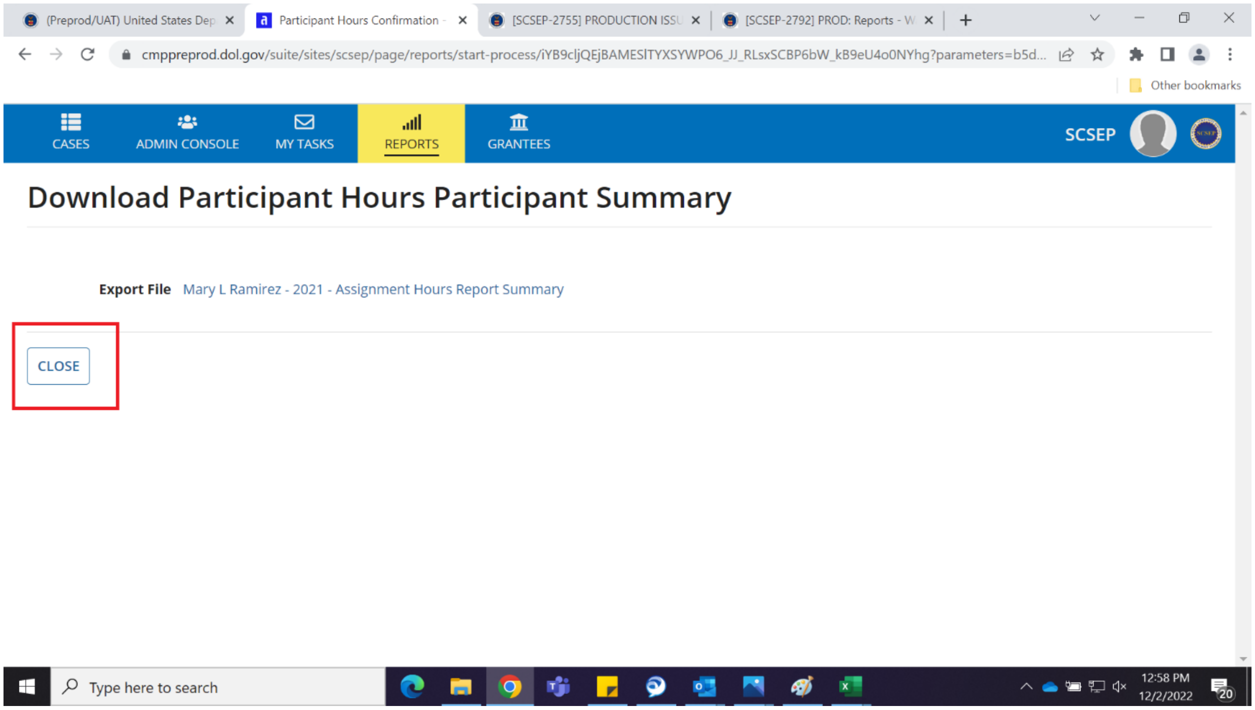
Click on the name or right click on the file name to download a copy of the file to your default file location.



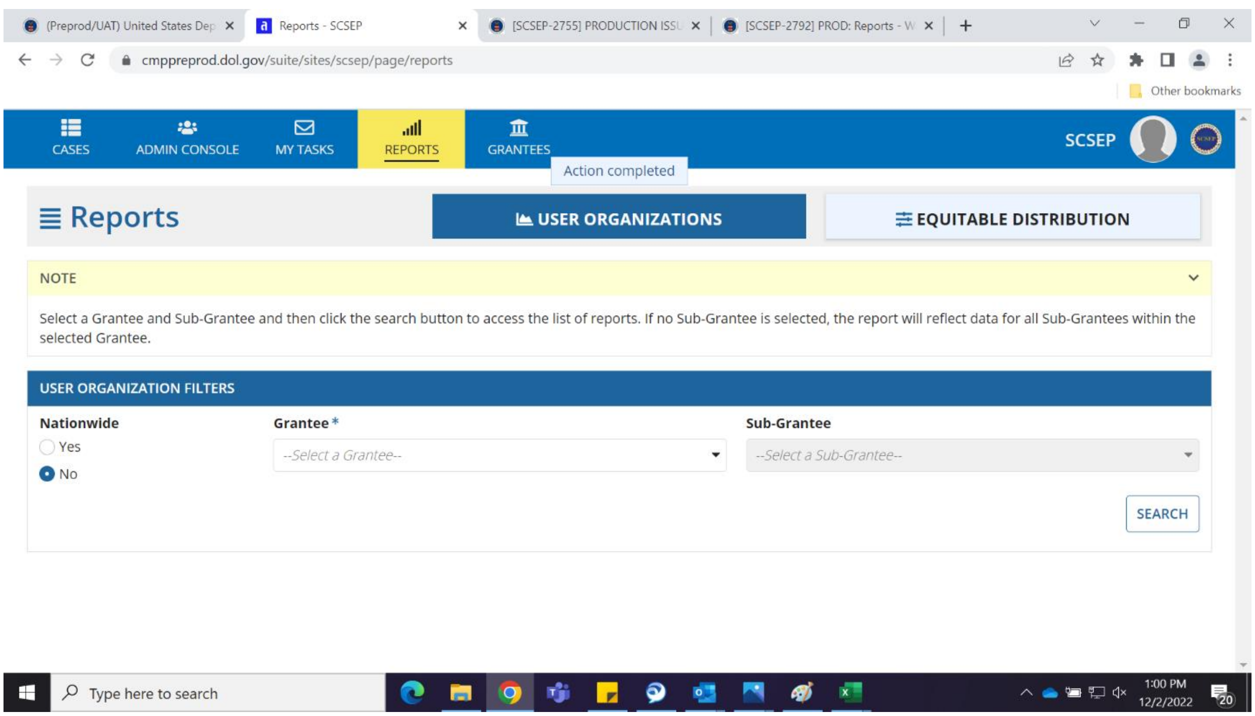
The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



Once you have generated the report, you can either exit the Reports module entirely or generate more reports by clicking the **CLOSE** button.



Clicking the **CLOSE** button will bring you back to the initial Reports tab screen.



2.0 Actions

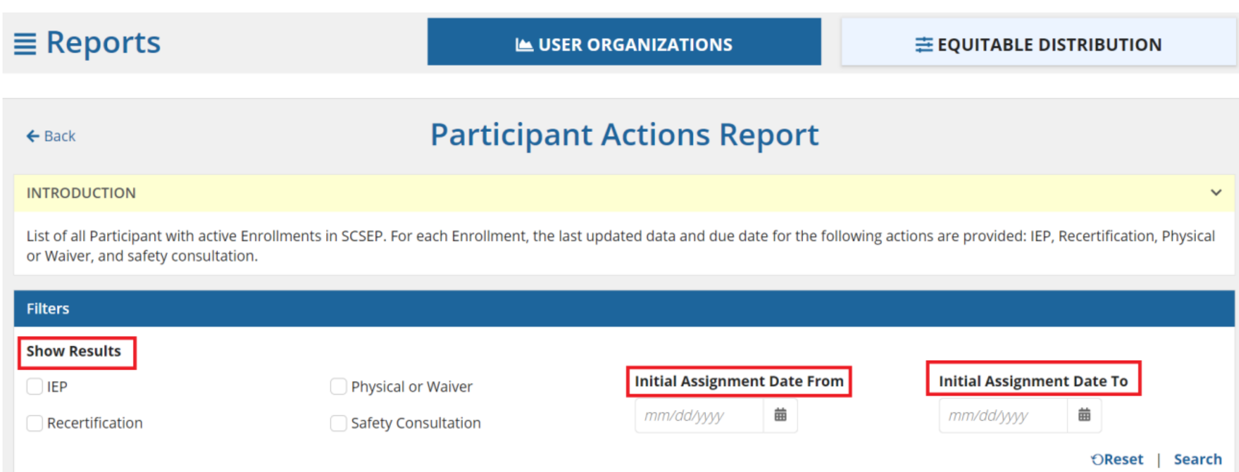
These reports are available at the Grantee Admin or Program Analyst levels only.

2.1 Participant Actions Report

This report can be filtered by the following

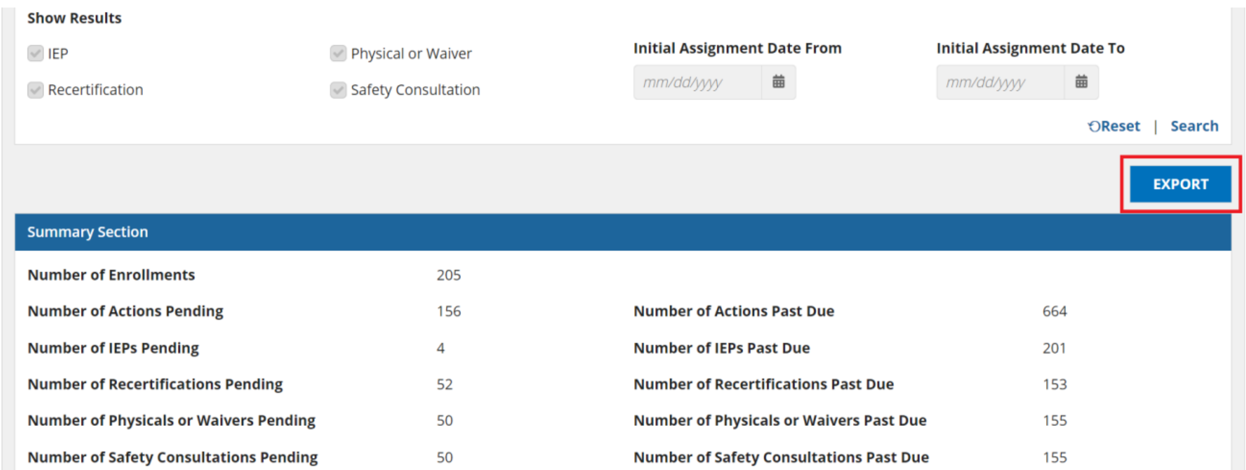
- **Show Results**: Choose none or any combination of three for IEP, Recertification, Physical or Waiver and Safety Consultation
-
- **Initial Assignment Date From**: Optional field to narrow your search.
- **Initial Assignment Date To**: Optional field to narrow your search.

Clicking **RESET** will clear the values for the filters.

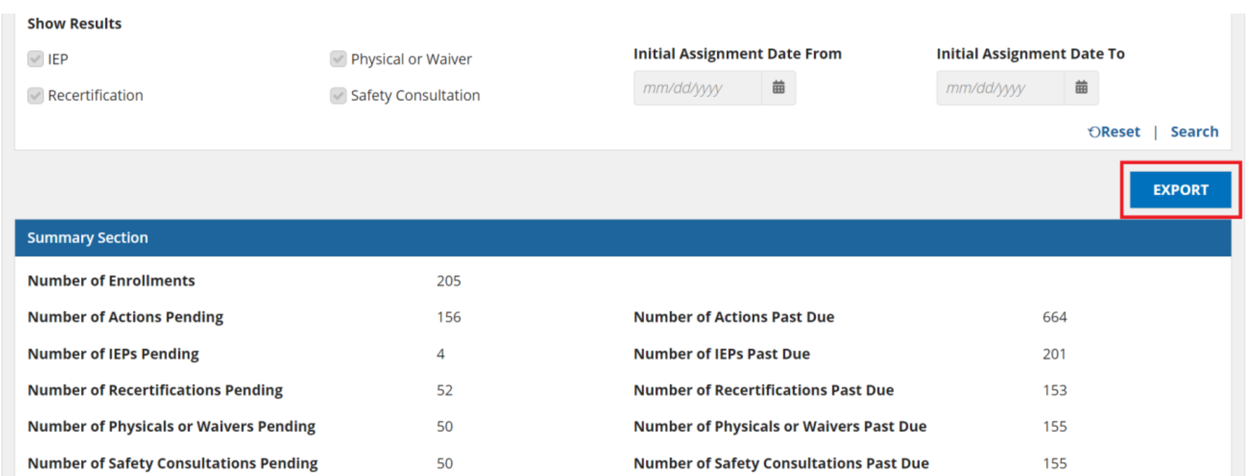


There are no required filters for this report.

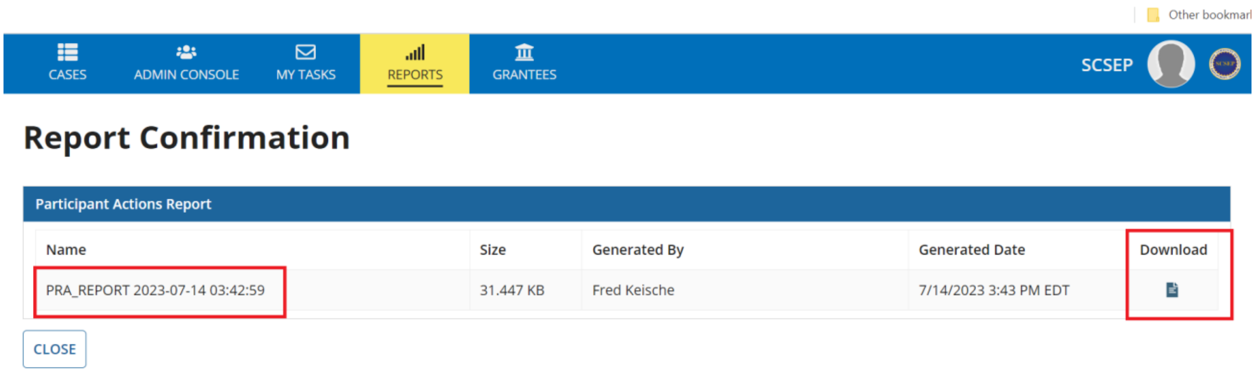
Choose filters and click **SEARCH**. The screen will show aggregate results based on the filters you selected.



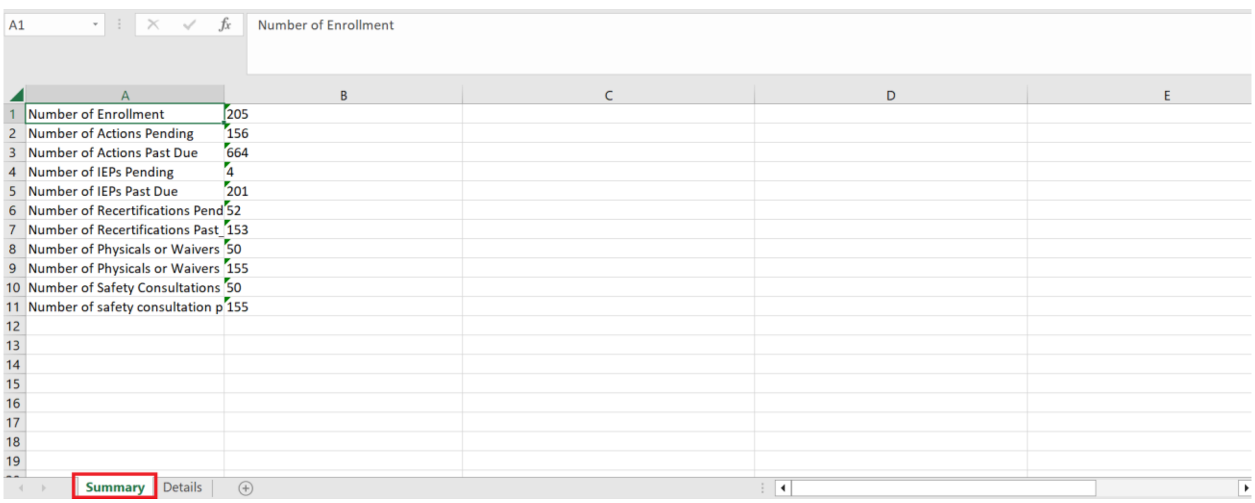
The **Summary Section** of the report can be exported by clicking the **EXPORT** button below the **Filters** section.



When a file name appears on the **Report Confirmation** screen, click on the icon under the word Download to save a copy of the file to your default file location.



The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet. The file has two tabs, Summary and Details, which replicate the report as seen on the screen.



A1 | Participant

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	Participa	Participa	Home_P	Email	County_o	Case_Ass	Initial_As	IEP_Statu	Date_of_	Due_Dat	Recertific	Date_of_	Due_Dat	Physical_	Date_of_	Due_Dat	Assignme	Safety_C	Date_of_	D
2	Ofelia,Gor	9936461	(575)312-	Myophelia	Dona Ana	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	8/4/2021	8/4/2022	06/21/202	Past due	08/04/2020	
3	Jasmine,Y	9953339	(505)593-		McKinley (	Smith,Mar	6/5/2018	Past Due	########	########	Past Due	4/6/2022	4/6/2023	Past Due	1/8/2021	1/8/2022	06/08/201	Past due	04/10/2010	
4	David,Duc	9953790	(505)402-		San Juan (	Smith,Mar	6/4/2018	Past Due	5/4/2022	########	Past Due	########	########	Past Due	########	########	04/20/202	Past due	05/10/2020	
5	Marcellina	9954369	(505)870-		McKinley (	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	########	########	06/18/201	Past due	04/09/2010	
6	Margaret,	9956104	(505)486-	daleann55	San Juan (	Smith,Mar	########	Past Due	7/8/2022	1/8/2023	Past Due	########	########	Past Due	########	########	07/20/201	Past due	07/10/2010	
7	Barbara ,T	9957201	(505)243-	telynor@c	Bernalillo	Smith,Mar	8/2/2018	Past Due	8/9/2022	2/9/2023	Past Due	########	########	Past Due	########	########	08/02/201	Past due	09/24/2020	
8	Gloria,Bar	9958708	(505)557-		Santa Fe C	Smith,Mar	########	Past Due	1/4/2022	7/4/2022	Past Due	########	########	Past Due	########	########	09/10/201	Past due	08/03/2020	
9	Carmen,La	9958714	(505)306-		Bernalillo	Smith,Mar	########	Past Due	########	6/2/2022	Past Due	########	########	Past Due	5/7/2019	5/7/2020	08/27/201	Past due	03/31/2020	
10	Arlene,Ru	9959690	(505)486-		San Juan (	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	########	########	07/01/202	Past due	01/26/2020	
11	Jamie,Ford	9963781	(505)357-	balgal15@	Valencia C	Smith,Mar	########	Past Due	2/8/2022	8/8/2022	Past Due	########	########	Past Due	########	########	01/22/202	Past due	05/07/2020	
12	Donna,He	9971249	(505)402-	donnahen	San Juan (	Smith,Mar	########	Past Due	6/7/2022	########	Past Due	4/6/2022	4/6/2023	Past Due	7/4/2022	7/4/2023	03/18/202	Past due	02/27/2010	
13	Gracia,Bra	9887643	(505)701-	gbrabetz@	San Juan (	Smith,Mar	########	Past Due	7/6/2022	1/6/2023	Past Due	########	########	Past Due	########	########	02/10/202	Past due	04/14/2020	
14	J. Kelly,Crc	9972376	(505)353-	slvr58ddy	Valencia C	Smith,Mar	6/7/2019	Past Due	2/4/2022	8/4/2022	Past Due	########	########	Past Due	########	########	06/07/201	Past due	07/30/2020	
15	Anita,Sedr	9984120	(505)261-	anitasedn	Bernalillo	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	########	########	02/24/202	Past due	03/31/2020	
16	Julianne,G	9983208	(505)235-	jmgmitch@	Bernalillo	Smith,Mar	2/7/2020	Past Due	########	########	Past Due	########	########	Past Due	########	########	06/22/202	Past due	11/02/2021	
17	Larry,Huff	9983121	(505)861-	mesacowb	Valencia C	Smith,Mar	2/6/2020	Past Due	2/9/2022	8/9/2022	Past Due	########	########	Past Due	########	########	02/06/202	Past due	03/31/2020	
18	Ronald,Alc	9986694	(907)203-		San Juan (	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	########	########	02/03/202	Past due	07/12/2020	
19	Charles,Br	9994791	(303)263-	hawks197	Bernalillo	Smith,Mar	########	Past Due	########	########	Past Due	########	########	Past Due	9/9/2021	9/9/2022	10/04/202	Past due	11/02/2021	

The bottom of the screen shows individual Participants. These can be sorted on the Participant, Initial Assignment Date, Date of Last IEP, Date of Next IEP, Date of Recertification, Date of Next Recertification, Date of Last Physical or Waiver, Date of Next Physical or Waiver, Assignment Date, and Host Agency Columns.

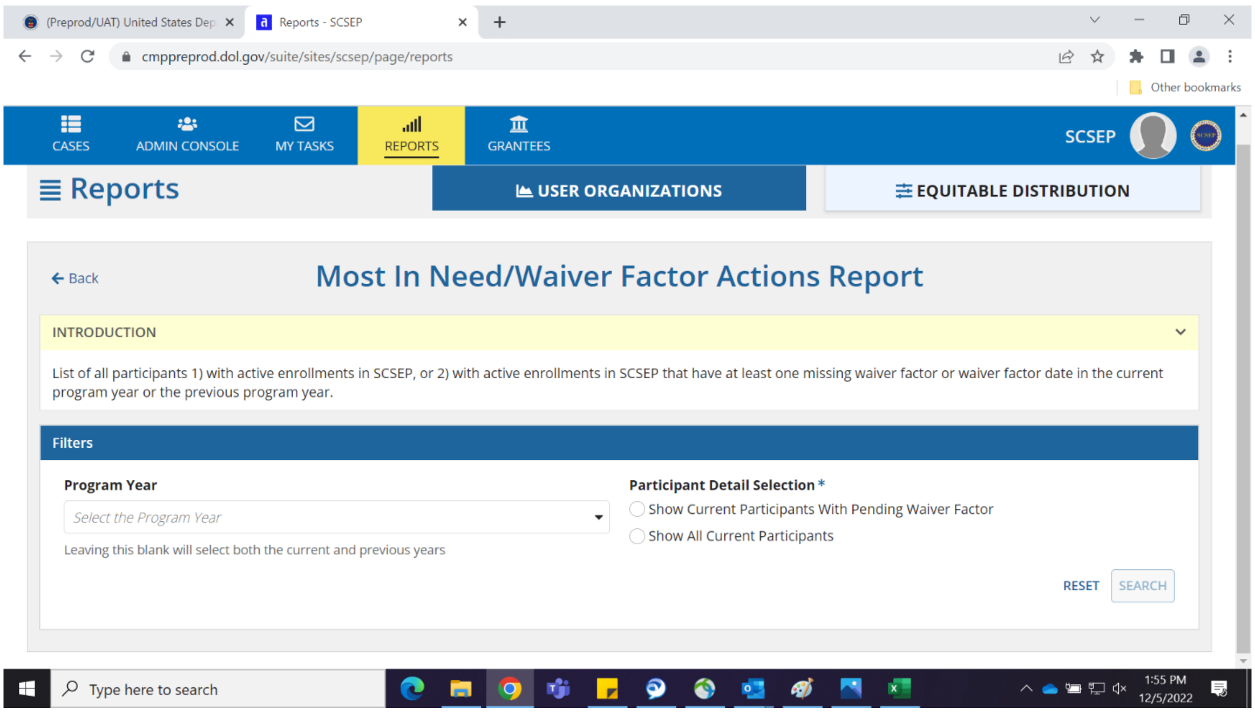
Detail Section

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Participant	Participant ID	Home Phone Number	Email	County of Residence	Case Assigned to	Initial Assignment Date	IEP Status	Date of Last IEP	Due Date of Next IEP	Recertification Status	Date of Recertif
Gonzales, Ofelia	9936461	(575)312-6494	Myophelia70@gmail.com	Dona Ana County	Smith, Mary	06/16/2017	Past Due	02/10/2022	08/10/2022	Past due	04/11/2

Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

2.2 Most in Need/Waiver Factor Actions Report



This report can be filtered by the following

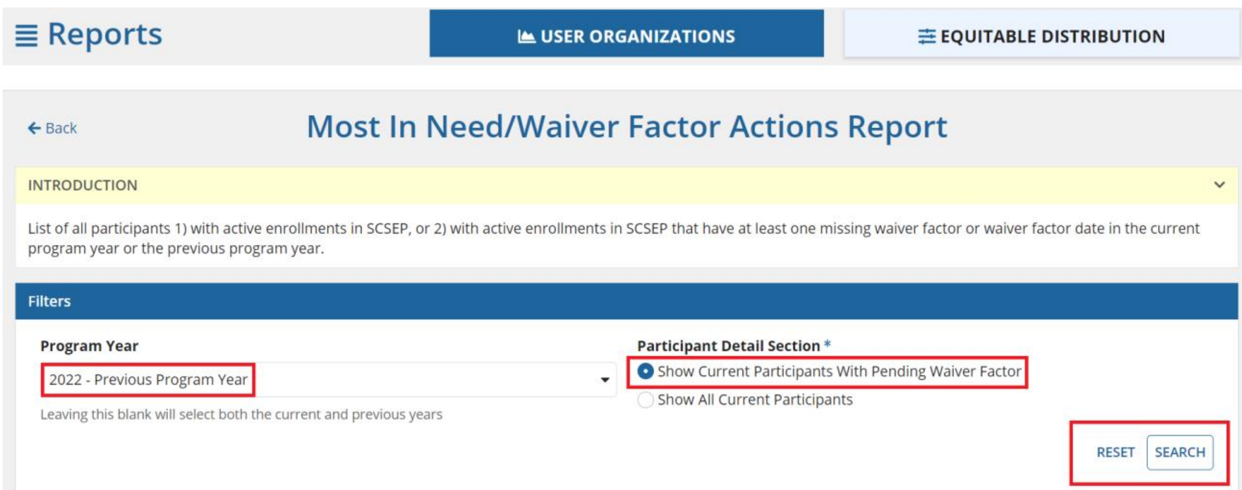
- **Program Year**: The dropdown will allow you to select one of the two program years available (current year and previous year). Leaving this blank will select both the current year and the previous year.

- **Participant Detail Selection**: You can select either to show Current Participants With Pending Waiver Factors or you can select to show All Current Participants. This is a required field.

Clicking **RESET** will clear the values for the filters.

The **Participant Detail Selection** is the only required field for this report.

Choose filters and click **SEARCH**. The screen will show aggregate results based on the filters you selected.



Results Summary

Number of Participants:	5
Number of Participants 1 Year From Durational Limit:	1
Percent of Participants 1 Year from Durational Limit:	20%
Number of Participants with Waiver Factors in need of update in Current Program Year:	0
Percent of Participants with Waiver Factors in need of update in Current Program Year:	N/A
Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year:	0
Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year:	N/A
Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year:	0
Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year:	N/A

Percent of Participants with Waiver Factors in need of update in Current Program Year:	N/A
Number of Participants with Waiver Factors in need of update in Previous Program Year:	5
Percent of Participants with Waiver Factors in need of update in Previous Program Year:	100%
Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year:	N/A
Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year:	0
Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year:	N/A

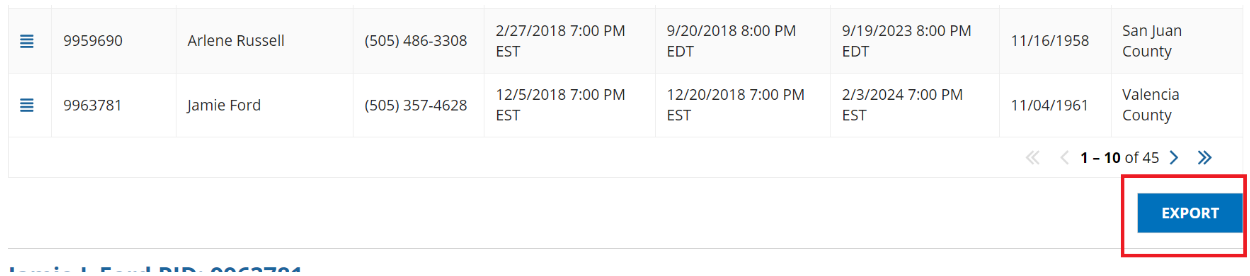
The screen will display aggregate results for the Grantee/Sub-Grantee you have chosen and display them under Results Summary. This will include items such as Number of Participants 1 Year from Durational Limit, Number of Participants beyond Durational Limited Date with updated Waiver Factors in Current Program Year, Percent of Participants with Waiver Factors in need of update in Previous Program Year, etc.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

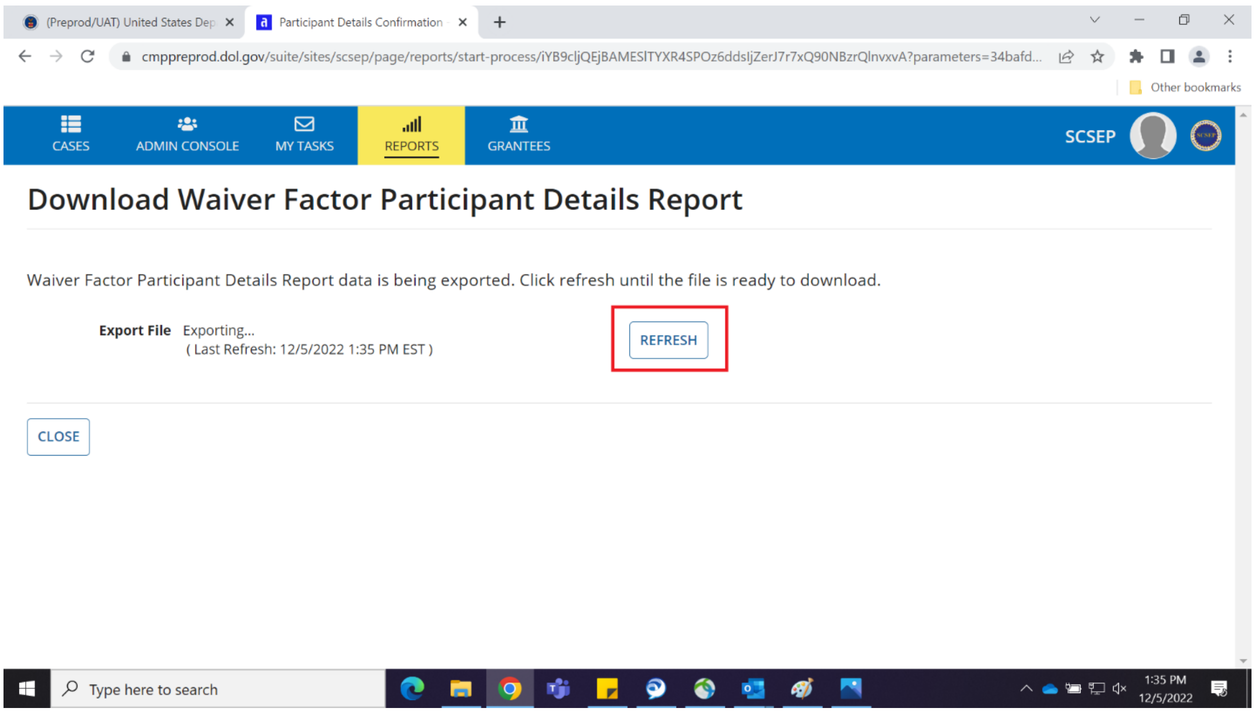
Participant Table

	Participant	Participant Id	Home Phone Number	Application Date	Enrollment Date	Within 1 Year of Durational Limit	Date Expected To Reach Durational Limit	Date of Birth	County of Residence	Case Worker
≣	Brabetz, Gracia	9887643	(505) 701-5728	08/29/2019	09/30/2019	No	N/A -- Currently on Approved Break	04/29/1953	San Juan County	Smith, Mary
≣	Telynor, Barbara	9957201	(505) 243-6951	06/14/2018	08/02/2018	Yes	09/24/2023	02/28/1952	Bernalillo County	Smith, Mary
≣	Aldridge, Ronald	9986694	(907) 203-0020	10/08/2020	10/16/2020	No	10/15/2025	09/19/1961	San Juan County	Smith, Mary
≣	Peina, Delbert	10000998	(505) 495-1984	04/25/2022	05/04/2022	No	05/03/2026	05/29/1965	Mora County	Smith, Mary

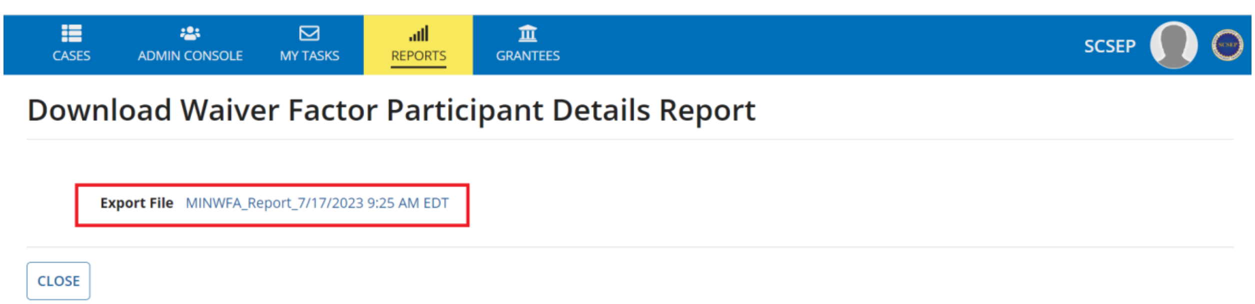
The Participant Table section of the report can be exported by clicking **EXPORT**.



Click **REFRESH** until a file name appears next to **Export File** on the screen.



Click on the file name or right click on the file name to download a copy of the file to your default file location.



The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet. The file has two tabs, Summary and Details which replicates the report as seen on the screen.

	A	B
1	Number of Participants	154
2	Number of Participants 1 Year From Durational Limit	65
3	Percent of Participants 1 year from Durational Limit	42.2%
4	Number of Participants with Waiver Factors in need of update in Current Program Year	0
5	Percent of Participants with Waiver Factors in need of update in Current Program Year	N/A
6	Number of Participants with Waiver Factors in need of update in Previous Program Year	5
7	Percent of Participants with Waiver Factors in need of update in Previous Program Year	3.2%
8	Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year	0
9	Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year	N/A
10	Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year	0
11	Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year	N/A
12	Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year	0
13	Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year	N/A

Summary | Details

B3 | 9956104

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	Participa	Participa	Home_P	Applicati	Enrollme	Within_1	Date_Exp	Date_of_	County_o	Case_Wo	PY_2023_	PY_2023_	PY_2023_	PY_2023_	PY_2023_	PY_2023_	PY_2023_	PY_2023_	PY_2022_	PY
2	Brabetz, G	9887643	(505) 701-	########	########	No	N/A -- Cur	########	San Juan (	Smith, Ma							No as of ((		Still time f	Sti
3	Long, Mar	9956104	(505) 486-	########	########	Yes	7/19/2023	########	San Juan (	Smith, Ma							No as of ((		No - 07/18	No
4	Telynor, B	9957201	(505) 243-	########	8/2/2018	Yes	9/24/2023	########	Bernalillo	Smith, Ma							No as of ((		Still time f	Sti
5	Russell, Ar	9959690	(505) 486-	########	########	Yes	9/20/2023	########	San Juan (	Smith, Ma							No as of ((		No -	No
6	Aldridge, F	9986694	(907) 203-	########	########	No	10/15/202	########	San Juan (	Smith, Ma							No as of ((		Still time f	Sti
7	Peina, Del	10000998	(505) 495-	########	5/4/2022	No	5/3/2026	########	Mora Cou	Smith, Ma							No as of ((		Still time f	Sti
8	Retest-001	10003884	(222) 222-	1/1/2022	1/1/2022	No	4/27/2026	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 09/22	Ye
9	Retest-002	10003885	(222) 222-	########	########	No	4/27/2026	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 11/10	Ye
10	Retest-003	10003887	(222) 222-	1/1/2022	1/1/2022	No	4/27/2026	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 09/22	Ye
11	Retest-004	10003893	(222) 222-	########	########	No	N/A -- Cur	1/1/1950	Glouceste	fkcm01, fk							No as of ((		No - 09/23	Ye
12	Retest-006	10004228	(222) 222-	1/1/2022	1/2/2022	No	N/A -- Cur	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 09/27	Ye
13	Retest-008	10004230	(222) 222-	3/3/2022	3/3/2022	No	3/9/2026	1/1/1950	Essex Cou	fkcm01, fk							No as of ((		No - 10/03	Ye
14	Retest-011	10004839	(222) 222-	########	########	No	5/2/2027	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 09/29	No
15	Test-002, I	10004861	(222) 222-	1/1/2021	1/1/2021	No	12/31/202	1/1/1950	Cape May	fkcm01, fk							No as of ((		No - 10/03	No
16	Test-004, (	10004874	(222) 222-	8/1/2022	8/1/2022	No	12/30/202	1/1/1950	Glouceste	fkcm01, fk							No as of ((		No - 10/27	Ye
17	Test-001, S	10004945	(222) 222-	1/1/2022	########	No	1/12/2026	1/1/1950	Sussex Co	fkcm01, fk							No as of ((		No - 10/26	No
18	Orientatio	10005145	(222) 222-	1/1/2020	1/1/2020	No	12/30/202	1/1/1950	Essex Cou	fkcm01, fk							No as of ((		Yes - 11/1	Ye
19	Orientatio	10005149	(222) 222-	1/1/2020	1/1/2020	No	12/30/202	1/1/1950	Hunterdo	fkcm01, fk							No as of ((		Yes - 11/1	Ye
20	Transfer-T	10005354	(222) 222-	1/1/2020	4/2/2020	No	12/31/202	1/1/1950	Glouceste	fkcm01, fk							No as of ((		No - 12/13	No
21	Transfer-T	10005355	(222) 222-	1/1/2020	4/2/2022	No	12/31/202	1/1/1950	Glouceste	fkcm01, fk							No as of ((		No - 12/13	No

Summary | **Details**

To view an individual Participant’s report, click on the icon next to **Participant** . The screen will refresh and the individual Participant’s report will be visible at the bottom of the screen (you may have to scroll down).

Brabetz, Gracia PID: 9887643

2022 WAIVER FACTORS

Severe Disability
Still time for credit

Frail
Still time for credit

Old Enough, Not Receiving SS Title II
Still time for credit

Severly Ltd Emp Prospects
Still time for credit

Limited English Proficiency
Still time for credit

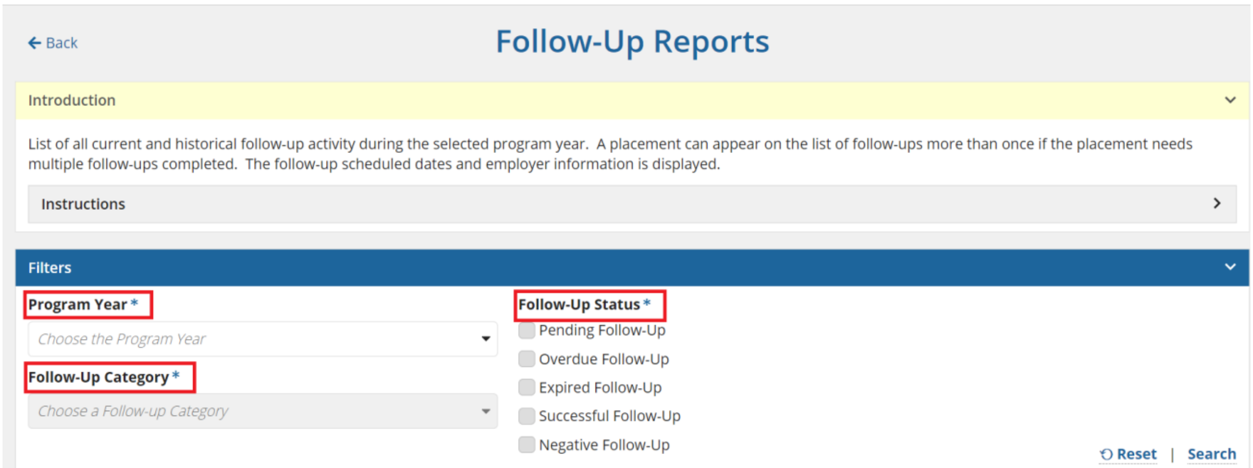
Low Literacy Skills
Still time for credit

75 or Older
No as of (6/30/2022)

Formerly Incarcerated

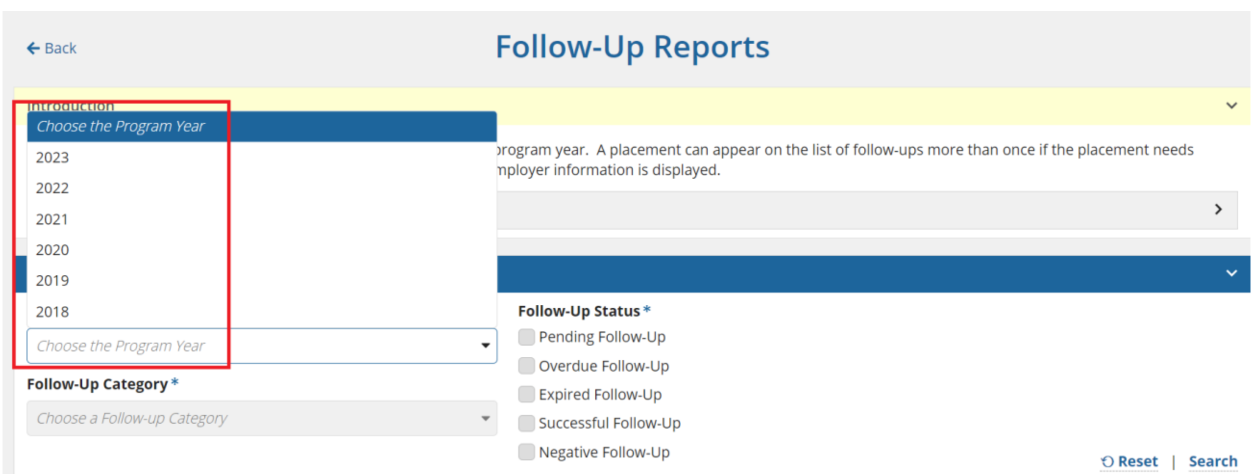
Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

2.3 Follow-Up Reports



This report has three required filters: Program Year, Follow-Up Category and Follow-Up Status. Each of these **must** be selected, in turn, to allow you to select from the next filter, and then to generate a report.

- Program Year: Choose a program year you would like to examine for follow-up activity. You can select the current year or one of several historical years. You must select one year from the dropdown in order to make the next filter selection.



- Follow-Up Category: Filter your results on Follow-Up 1, Follow-Up 2, Follow-Up 3 or all (1, 2 and 3). You must select one choice from the dropdown in order to move on to the next filter selection.

- Follow-Up Status: Refine your results for any number of Follow-Up Statuses. Select from Pending Follow-Up, Overdue Follow-Up, Expired Follow-Up, Successful Follow-Up, Negative Follow-Up. You must make at least one selection for the report to run.

Clicking Reset will clear the values for the filters. Once you have chosen your desired filters click SEARCH. The screen will display aggregate results for the Grantee/Sub-Grantee combination you have chosen in the top half of the screen, Summary and show you individual cases under the bottom half of the screen, as Follow Up Results Details.

Follow Up Report (2020)

Follow Up Results Details

Participant First Name	Participant Last Name	Participant ID	Participant Case ID	Participant Phone	Participant Email	Case Assigned To	Participant Exit Date	Follow-Up1 Scheduled Date	Follow-Up 1 Status	Follow-Up 1 Outcor
Juana	Locaspino	9954373	10365571	(505) 495-5500		Smith, Mary	03/17/2021	7/1/2021	Success	Yes

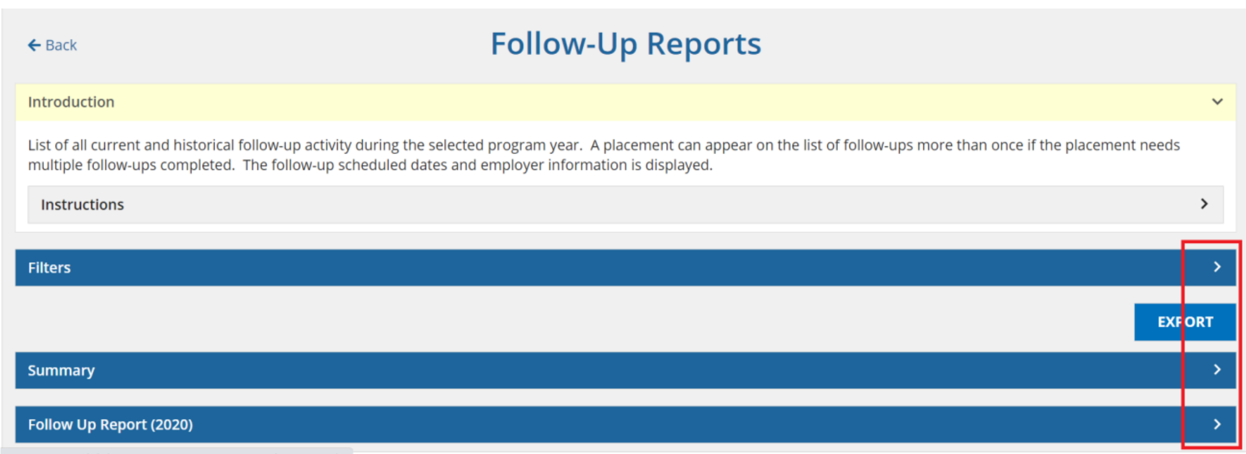
Follow Up Report (2020)

Follow Up Results Details

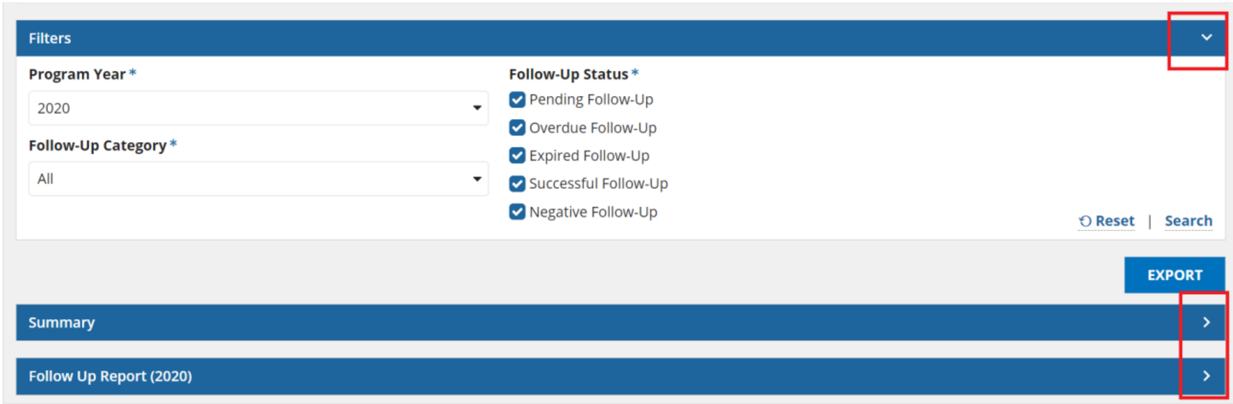
Follow-Up 1 Outcome	Follow-Up2 Scheduled Date	Follow-Up 2 Status	Follow-Up 2 Outcome	Follow-Up3 Scheduled Date	Follow-Up 3 Status	Follow-Up 3 Outcome	Employer	Address Line	Address Line 2	City	State	Zip	Employer Contact
Yes	10/1/2021	Success	No	1/1/2022	Success	Yes	Zuni Home Health Care Agency	Route North Building 52		Zuni Pueblo	New Mexico	87327	Gchachu, Carol

The Follow Up Results Details shows more information than can normally be displayed on a screen; you can scroll to see the remaining details by using the bar at the bottom of this part of the screen.

On the right side of the parts of this screen (Filters, Summary, Follow Up Report) you will see a caret that expands or contracts the information shown below the title bar. The Export button will always remain visible if there is information that can be exported. Below we see a screen where all the information has been contracted.

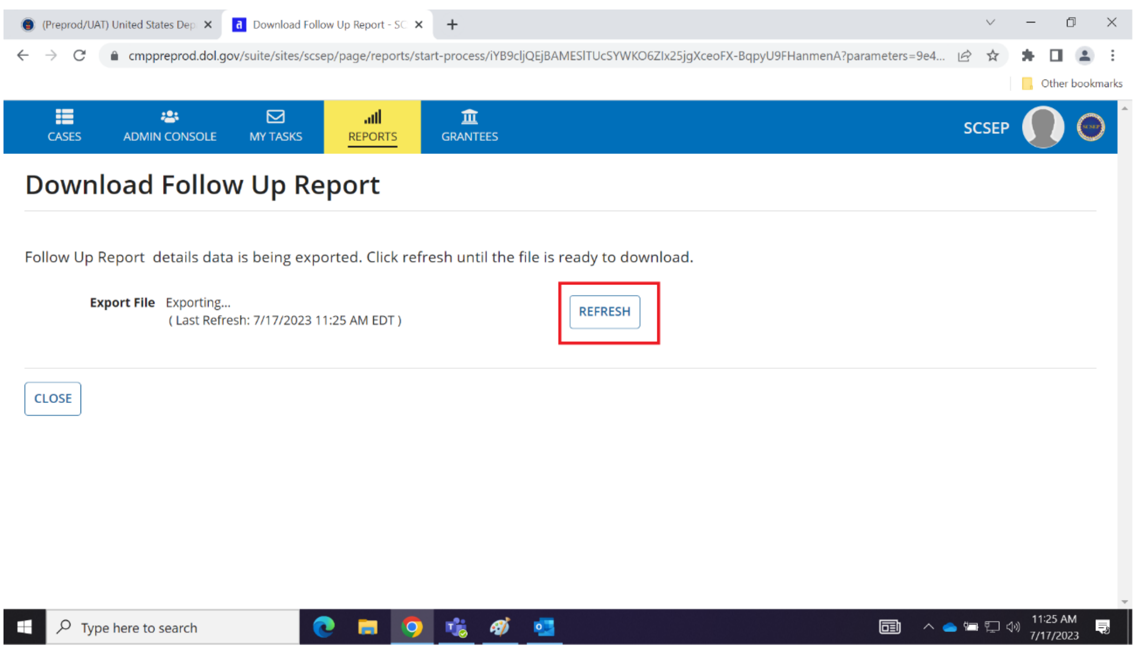


Here we see a screen where the Filters you selected are expanded, but the Summary and Follow Up Report are contracted.

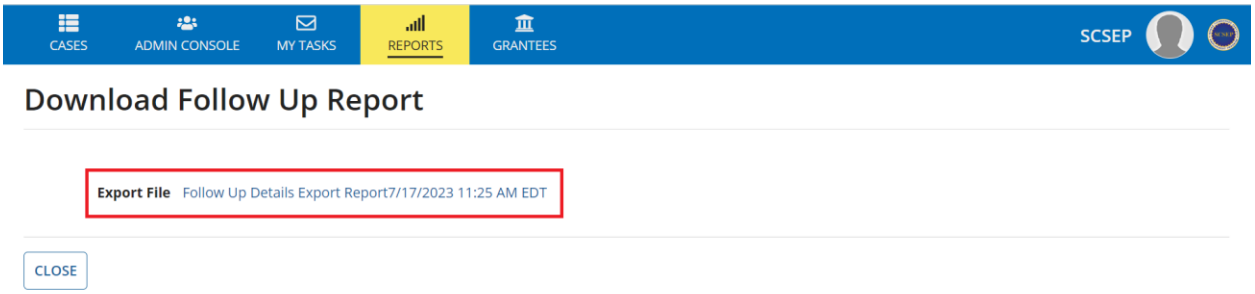


The Summary and Follow Up Report results can be exported by clicking EXPORT.

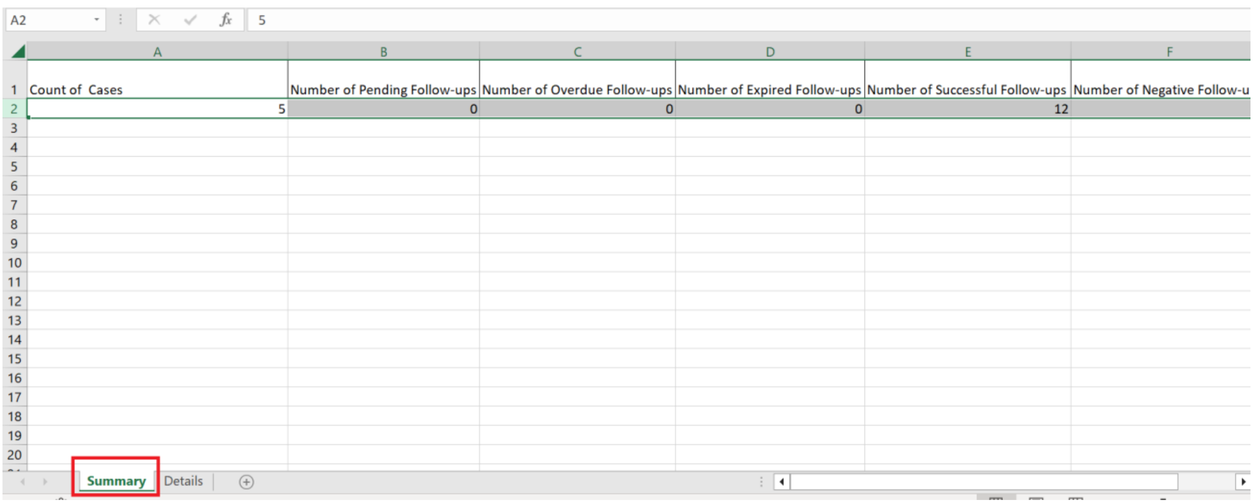
Click REFRESH until a file name appears next to Export File on the screen.



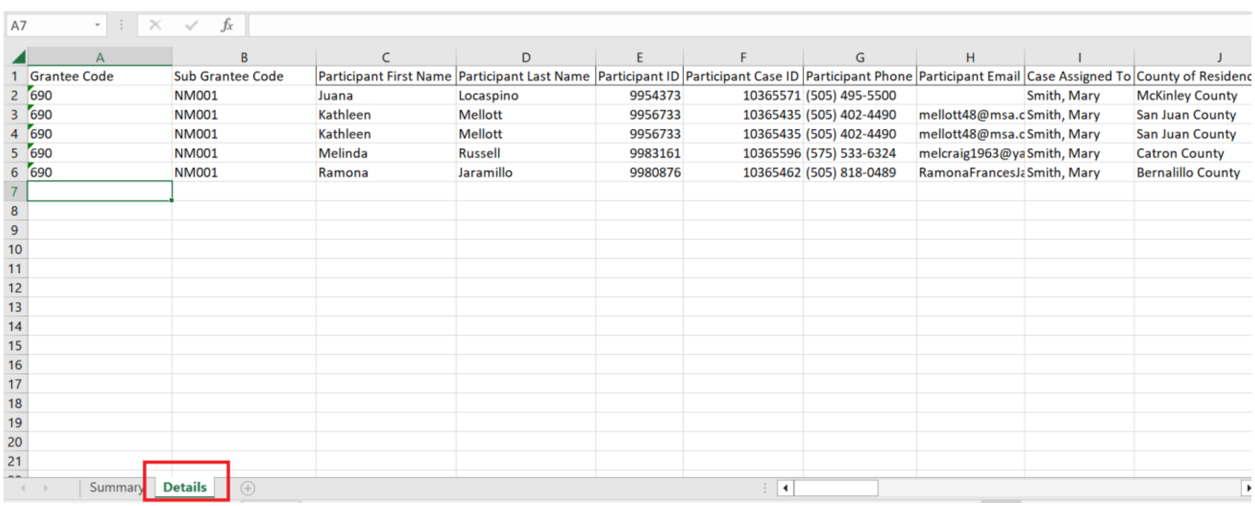
Click on the file name or right click on the file name to download a copy of the file to your default file location.



The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet. The file has two tabs, Summary and Details, corresponding to what you see in the Summary and Follow Up Results Details on the screen.



Count of Cases	Number of Pending Follow-ups	Number of Overdue Follow-ups	Number of Expired Follow-ups	Number of Successful Follow-ups	Number of Negative Follow-u
5	0	0	0	12	



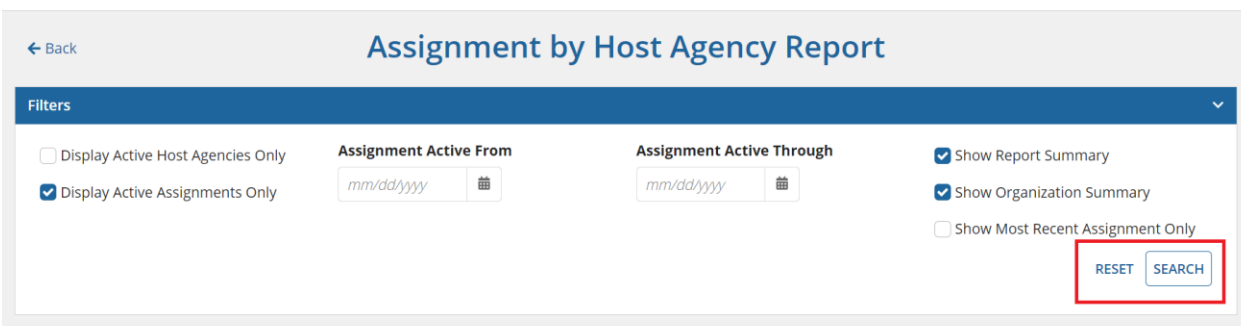
Grantee Code	Sub Grantee Code	Participant First Name	Participant Last Name	Participant ID	Participant Case ID	Participant Phone	Participant Email	Case Assigned To	County of Residenc
690	NM001	Juana	Locaspino	9954373	10365571	(505) 495-5500		Smith, Mary	McKinley County
690	NM001	Kathleen	Mellott	9956733	10365435	(505) 402-4490	mellott48@msa.c	Smith, Mary	San Juan County
690	NM001	Kathleen	Mellott	9956733	10365435	(505) 402-4490	mellott48@msa.c	Smith, Mary	San Juan County
690	NM001	Melinda	Russell	9983161	10365596	(575) 533-6324	melcraig1963@ya	Smith, Mary	Catron County
690	NM001	Ramona	Jaramillo	9980876	10365462	(505) 818-0489	RamonaFrancesJa	Smith, Mary	Bernalillo County

Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

2.4 Assignment by Host Agency Report

There are no required filters for this report. You can filter on:

- Display Active Host Agencies Only
- Display Active Assignments Only
- Assignment Active From (date range)
- Assignment Active Through (date range)
- Show Report Summary
- Show Organization Summary
- Show Most Recent Assignment Only



Choose filters and click **SEARCH**. If you selected Show Report Summary as one of your filters, then those results will be displayed in the top half of the screen.

Clicking **RESET** will clear the values for the filters.

EXPORT

Report Summary

Number of Host Agencies	Number of Active Host Agencies
213	28
Average Number of Participants	**Average Length of Assignment**
3	563

If you selected Show Organization Summary as one of your filters, then those results will be displayed in the middle of the screen.

Organization Summary

	Name	ID	FEIN	Address	Type	Number of Active Participants	Number of Inactive Participants
≣	University of New Mexico-Gallup Workforce Connection	10125374		705 Gurley Ave., New Mexico, Gallup, 87301	Not For Profit	0	1
≣	Santa Fe Senior Programs	10005495		PO Box 909, New Mexico, Santa Fe, 87504	Government	1	0
≣	Chihuahuan Desert Nature Park	10236164	850386047	100 E. Hadley Ave.,, New Mexico, Las Cruces, 88001	Not For Profit	0	1
≣	Santa Fe Community College - Continuiny Education	10244647	85031161	6401 Richards Ave., New Mexico, Santa Fe, 87508	Government	0	1
≣	New Mexico Legal Aid	10168077	850116950	PO Box 25486, New Mexico, Albuquerque, 87125	Not For Profit	0	2

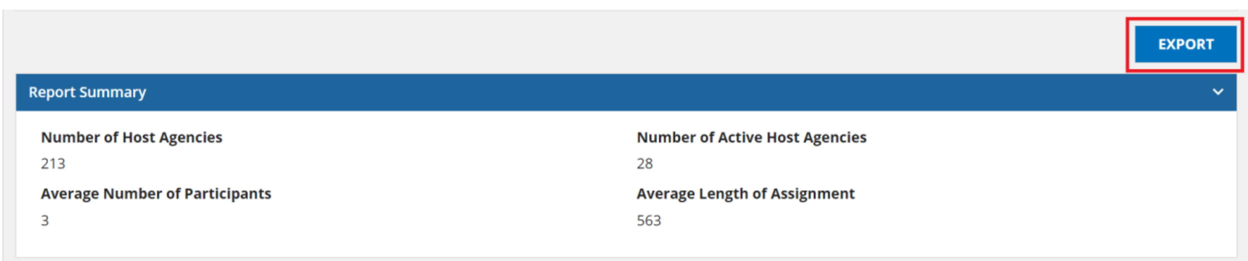
Selecting one of the icons to the left of the Name of a Host Agency will show Detail Level Elements in the bottom of the screen. This screen shows more information for each Host Agency than can be displayed on most screens, so you will have to scroll over to see the remaining fields.

Detail Level Elements

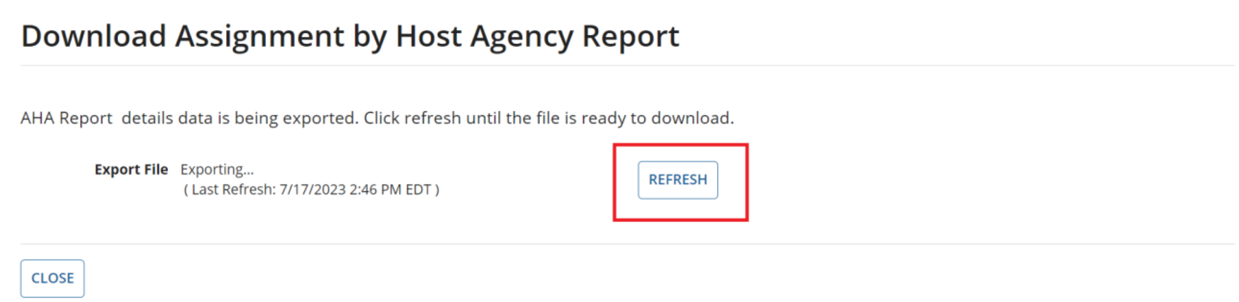
Participant	Participant ID	Home Phone Number	County of Residence	Case Assigned To	Active Assignment	Participant's Job Code	Assignment Start Date	Assignment End Date	Length of Assignment	Contact Person Name	Contact Person Phone Number
Beyuka, Christine	9864307	(505) 862-2479	McKinley County	Smith, Mary	N	Community and Social Service Occupations	8/10/2015	10/1/2015	53	Ms.Kendall, Hilda	(505) 726-8068
Rogers, Timothy	9978256	(505) 713-8271	McKinley County	Smith, Mary	N	Farming, Fishing, and Forestry Occupations	9/23/2019	6/14/2020	270	Ms.Kendall, Hilda	(505) 726-8068
Saltwater, Jean	9908804	(505) 905-5700	McKinley County	Smith, Mary	N	Community and Social Service Occupations	11/13/2018	12/14/2019	398	Ms.Kendall, Hilda	(505) 726-8068

Contact Person Cell Number	Contact Person Email	Supervisor Name	Supervisor Phone Number	Supervisor Cell Number	Supervisor Email	Participant's Schedule
	coo@thecommunitypantry.org					
	coo@thecommunitypantry.org					
	coo@thecommunitypantry.org					

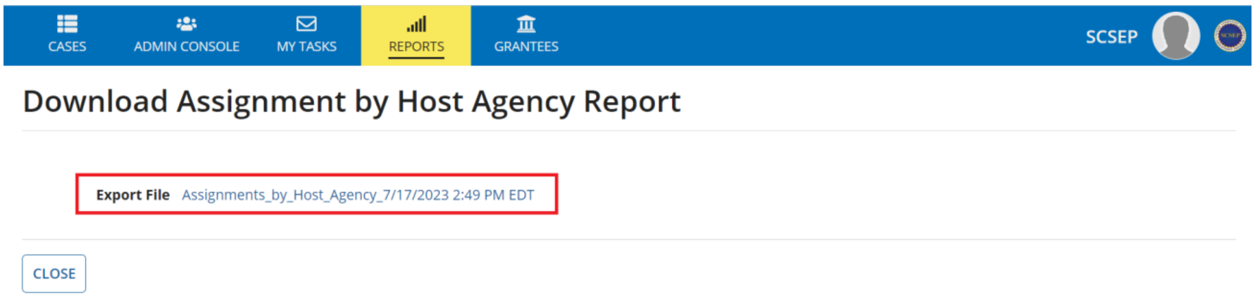
The Report Summary, Organization Summary and Detail Level Elements sections of the report, if selected, can be exported by clicking the **EXPORT** button above the Report Summary section.



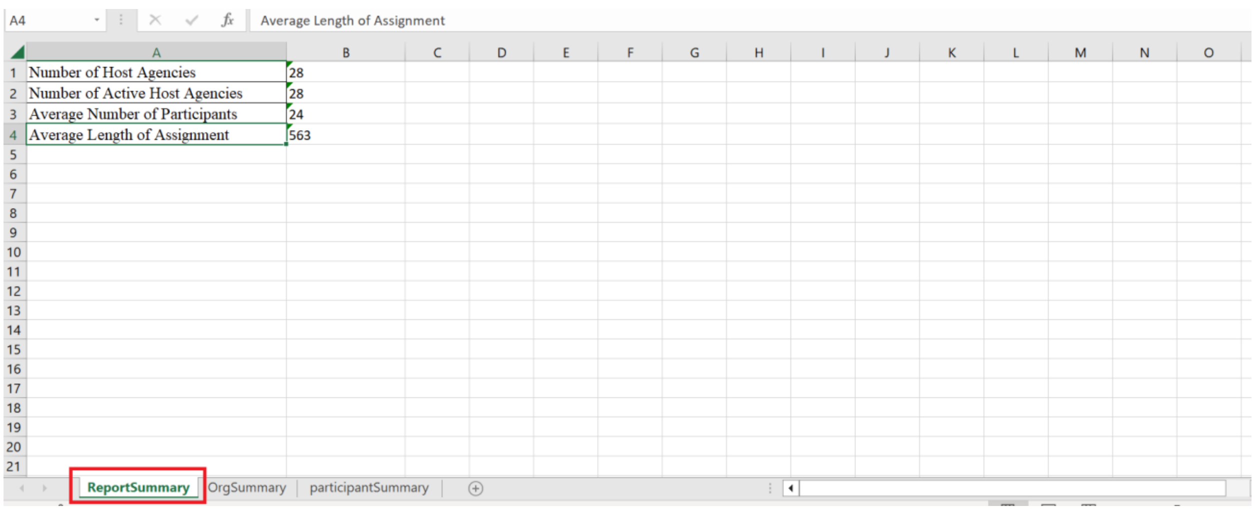
Click REFRESH until a file name appears next to Export File on the screen.



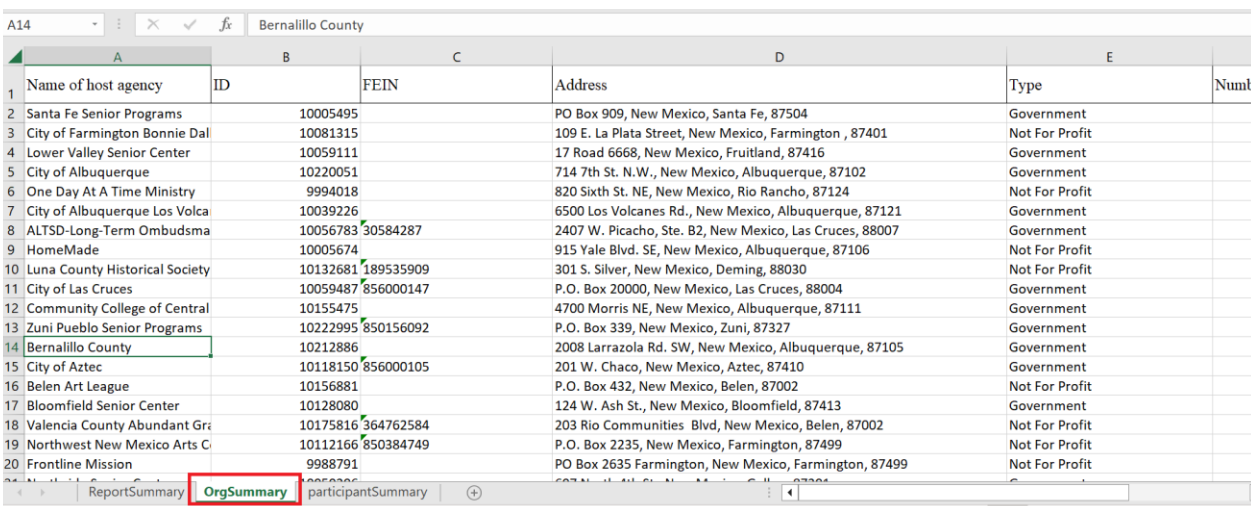
Click on the file name or right click on the file name to download a copy of the file to your default file location.



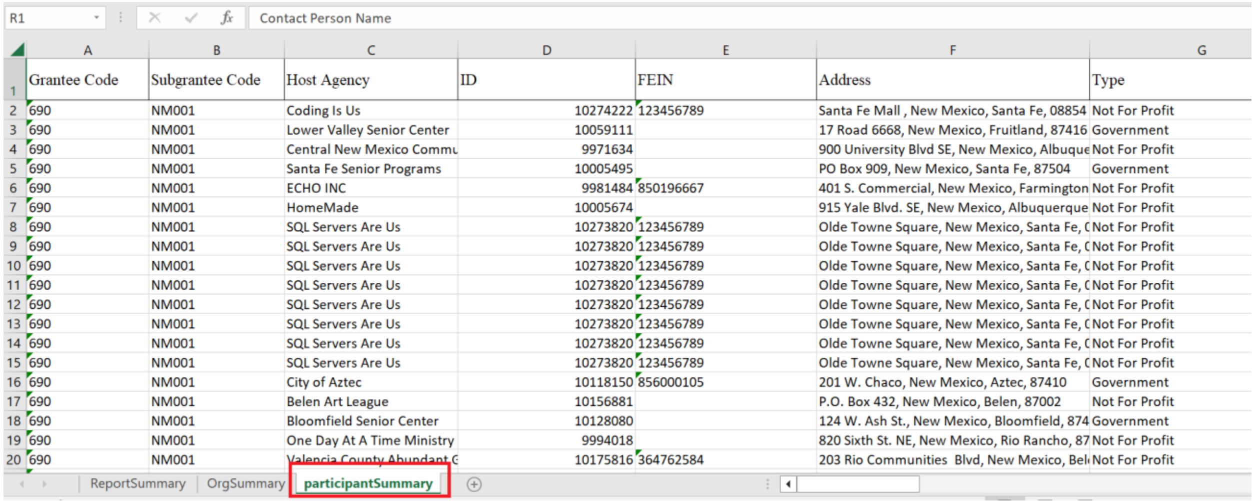
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet. The file has three tabs, ReportSummary, OrgSummary, and participantSummary, corresponding to the Report Summary, Organization Summary and Detail Level Elements that you see on the screen.



	A	B
1	Number of Host Agencies	28
2	Number of Active Host Agencies	28
3	Average Number of Participants	24
4	Average Length of Assignment	563



	A	B	C	D	E
1	Name of host agency	ID	FEIN	Address	Type
2	Santa Fe Senior Programs	10005495		PO Box 909, New Mexico, Santa Fe, 87504	Government
3	City of Farmington Bonnie Dal	10081315		109 E. La Plata Street, New Mexico, Farmington , 87401	Not For Profit
4	Lower Valley Senior Center	10059111		17 Road 6668, New Mexico, Fruitland, 87416	Government
5	City of Albuquerque	10220051		714 7th St. N.W., New Mexico, Albuquerque, 87102	Government
6	One Day At A Time Ministry	9994018		820 Sixth St. NE, New Mexico, Rio Rancho, 87124	Not For Profit
7	City of Albuquerque Los Volca	10039226		6500 Los Volcanes Rd., New Mexico, Albuquerque, 87121	Government
8	ALTSD-Long-Term Ombudsma	10056783	30584287	2407 W. Picacho, Ste. B2, New Mexico, Las Cruces, 88007	Government
9	HomeMade	10005674		915 Yale Blvd. SE, New Mexico, Albuquerque, 87106	Not For Profit
10	Luna County Historical Society	10132681	189535909	301 S. Silver, New Mexico, Deming, 88030	Not For Profit
11	City of Las Cruces	10059487	856000147	P.O. Box 20000, New Mexico, Las Cruces, 88004	Government
12	Community College of Central	10155475		4700 Morris NE, New Mexico, Albuquerque, 87111	Government
13	Zuni Pueblo Senior Programs	10222995	850156092	P.O. Box 339, New Mexico, Zuni, 87327	Government
14	Bernalillo County	10212886		2008 Larrazola Rd. SW, New Mexico, Albuquerque, 87105	Government
15	City of Aztec	10118150	856000105	201 W. Chaco, New Mexico, Aztec, 87410	Government
16	Belen Art League	10156881		P.O. Box 432, New Mexico, Belen, 87002	Not For Profit
17	Bloomfield Senior Center	10128080		124 W. Ash St., New Mexico, Bloomfield, 87413	Government
18	Valencia County Abundant Gra	10175816	364762584	203 Rio Communities Blvd, New Mexico, Belen, 87002	Not For Profit
19	Northwest New Mexico Arts C	10112166	850384749	P.O. Box 2235, New Mexico, Farmington, 87499	Not For Profit
20	Frontline Mission	9988791		PO Box 2635 Farmington, New Mexico, Farmington, 87499	Not For Profit



R1 | Contact Person Name

	A	B	C	D	E	F	G
1	Grantee Code	Subgrantee Code	Host Agency	ID	FEIN	Address	Type
2	690	NM001	Coding Is Us	10274222	123456789	Santa Fe Mall , New Mexico, Santa Fe, 08854	Not For Profit
3	690	NM001	Lower Valley Senior Center	10059111		17 Road 6668, New Mexico, Fruitland, 87416	Government
4	690	NM001	Central New Mexico Commu	9971634		900 University Blvd SE, New Mexico, Albuque	Not For Profit
5	690	NM001	Santa Fe Senior Programs	10005495		PO Box 909, New Mexico, Santa Fe, 87504	Government
6	690	NM001	ECHO INC	9981484	850196667	401 S. Commercial, New Mexico, Farmington	Not For Profit
7	690	NM001	HomeMade	10005674		915 Yale Blvd. SE, New Mexico, Albuquerque	Not For Profit
8	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
9	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
10	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
11	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
12	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
13	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
14	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
15	690	NM001	SQL Servers Are Us	10273820	123456789	Olde Towne Square, New Mexico, Santa Fe, (	Not For Profit
16	690	NM001	City of Aztec	10118150	856000105	201 W. Chaco, New Mexico, Aztec, 87410	Government
17	690	NM001	Belen Art League	10156881		P.O. Box 432, New Mexico, Belen, 87002	Not For Profit
18	690	NM001	Bloomfield Senior Center	10128080		124 W. Ash St., New Mexico, Bloomfield, 874	Government
19	690	NM001	One Day At A Time Ministry	9994018		820 Sixth St. NE, New Mexico, Rio Rancho, 87	Not For Profit
20	690	NM001	Valencia County Abundant G	10175816	364762584	203 Rio Communities Blvd, New Mexico, Bel	Not For Profit

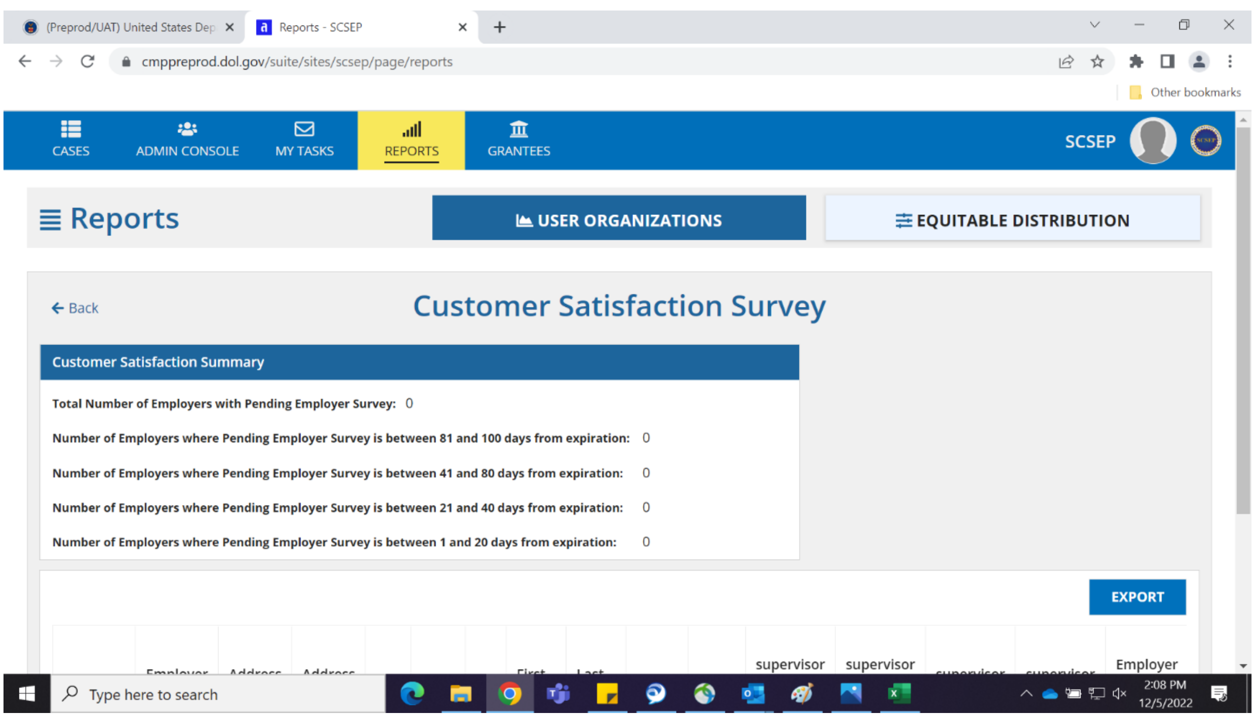
ReportSummary | OrgSummary | participantSummary

Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

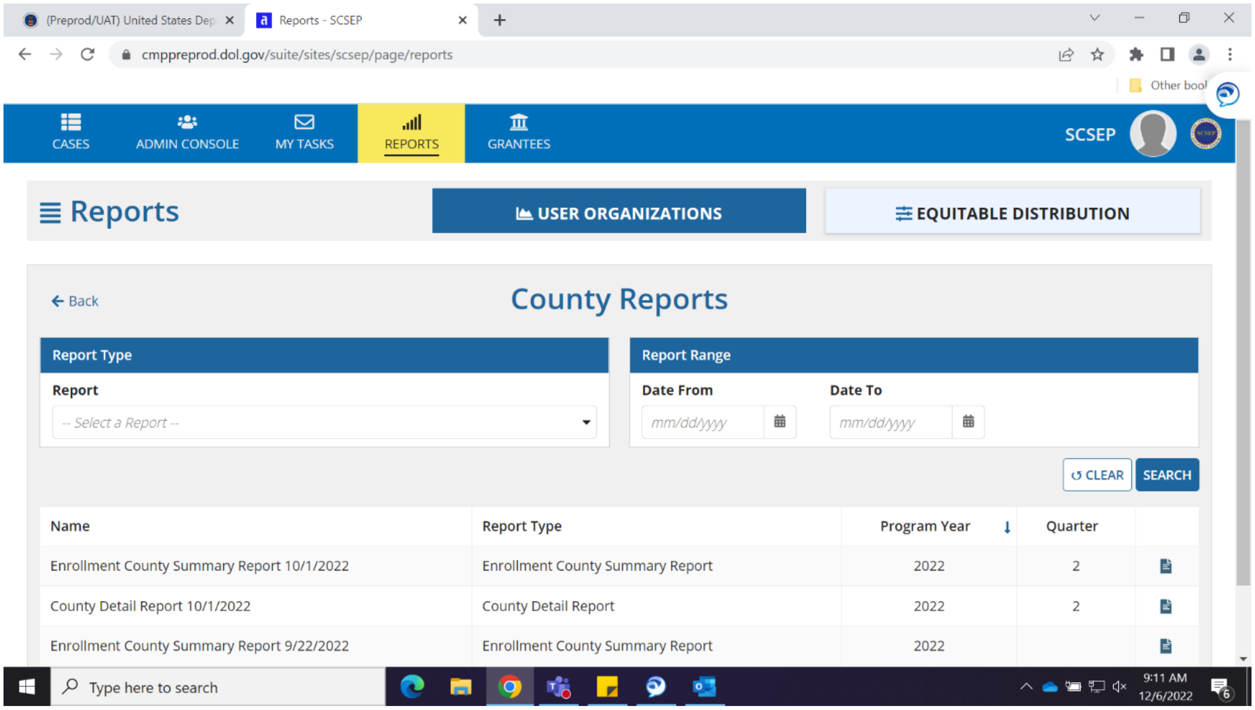
3.0 Employers

These reports are available at the Grantee Admin or Program Analyst levels only.

3.1 Customer Satisfaction Survey



3.2 County Reports

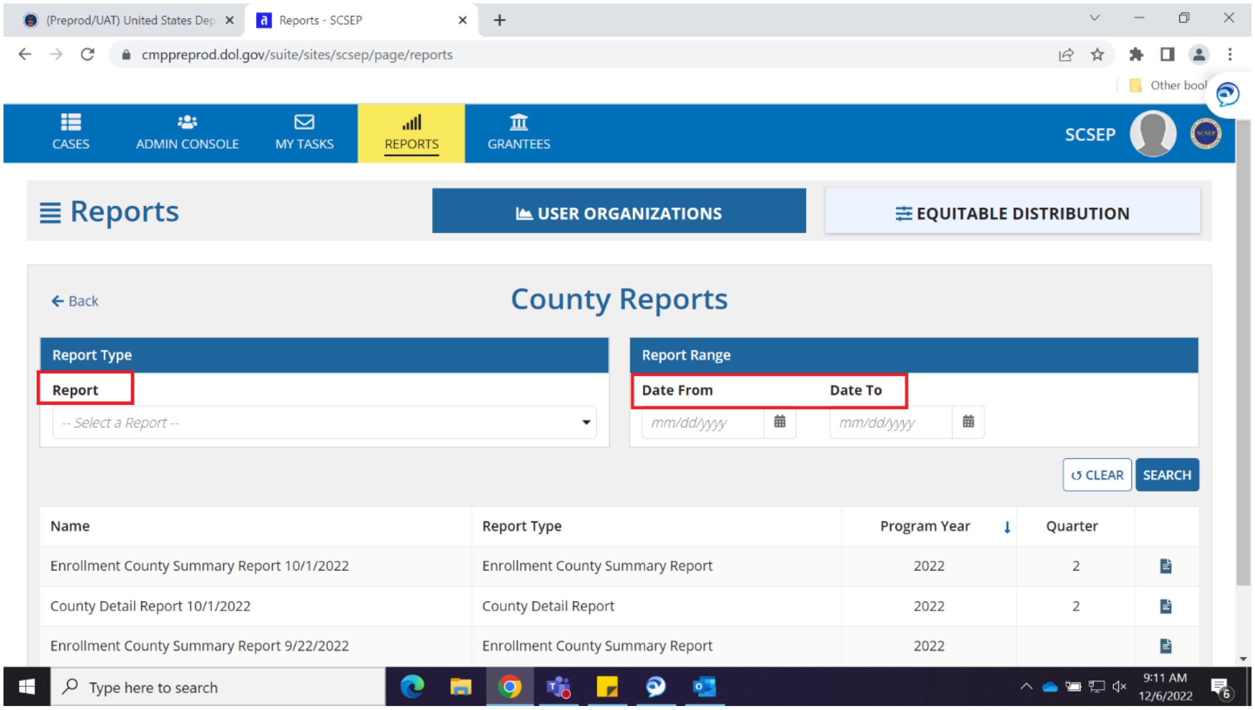


This report is available at the Program Analyst level only.

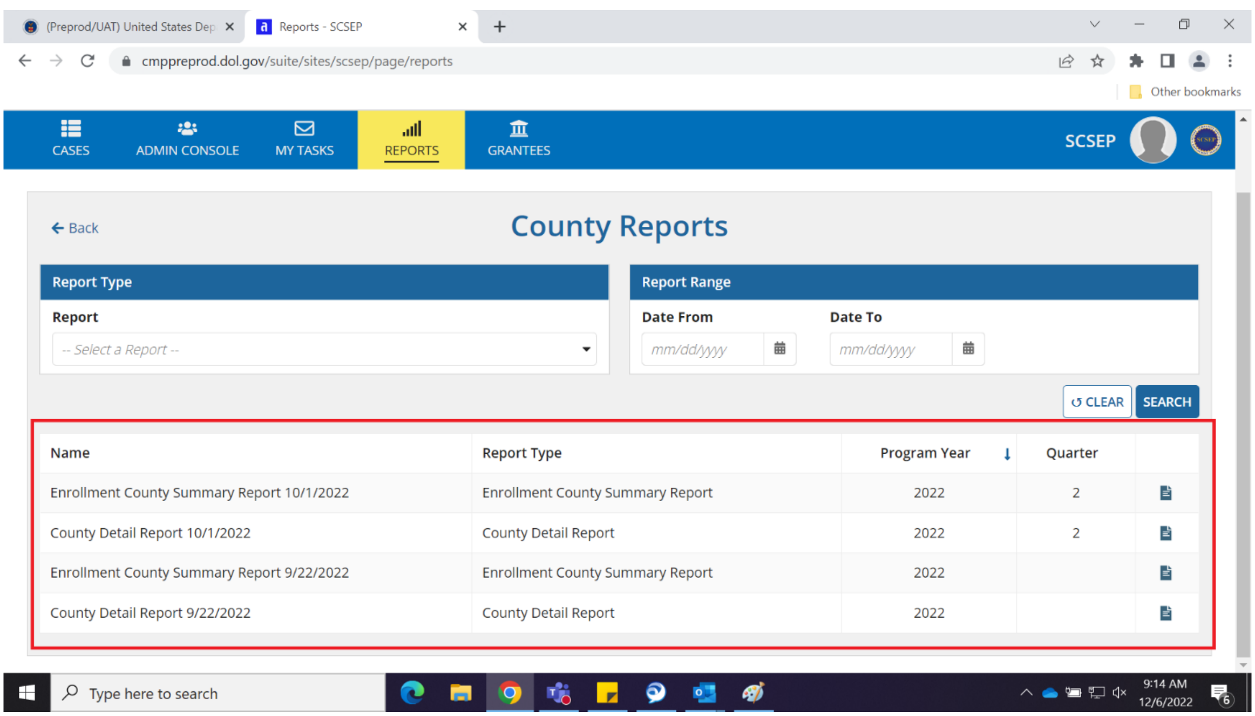
This report can be filtered by the following

- **Report**: Enrollment County Summary Report or County Detail Report.
- **Report Range**: Enter a beginning and end date range.

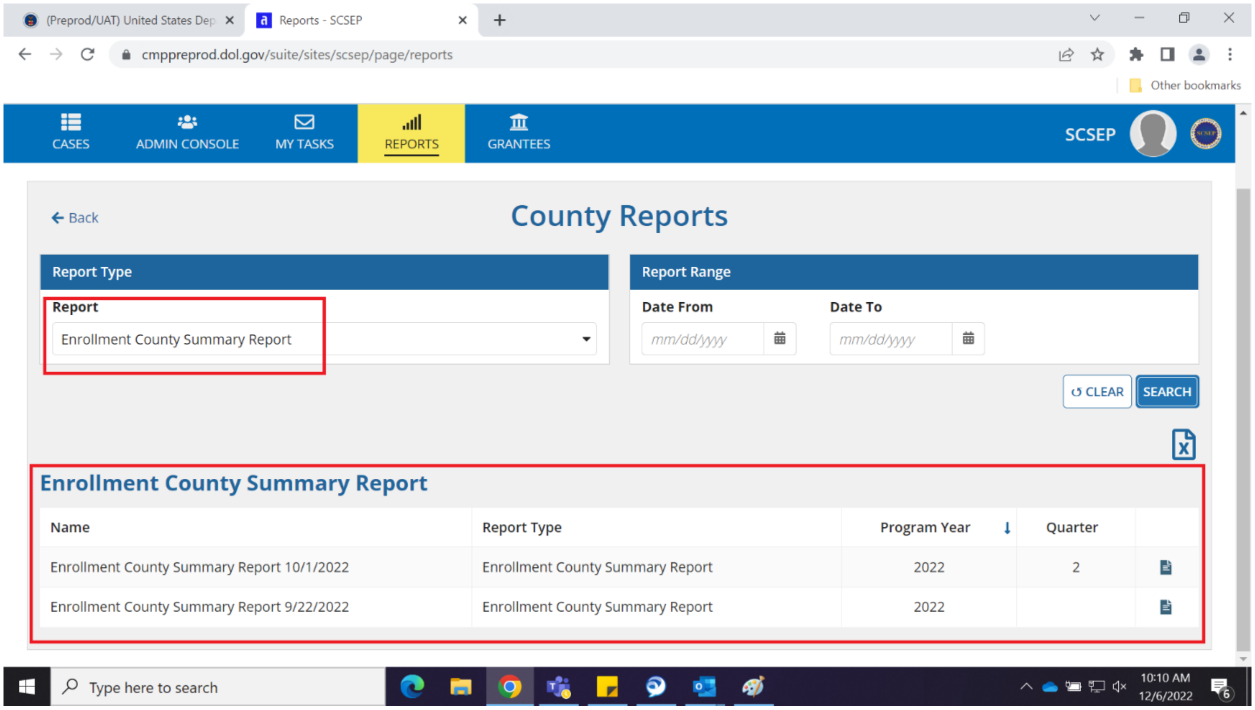
Clicking **CLEAR** will clear all the values for the filters.



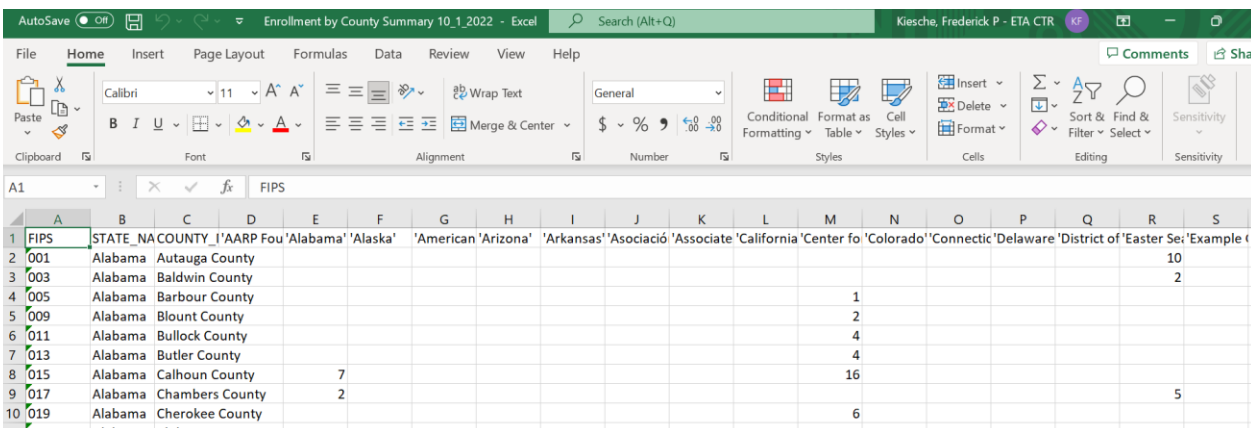
This report has no required fields. If you do not select any filters, the bottom part of the screen will display all available county reports.



Choose desired filters and click **SEARCH**. The screen will display the available reports for the filters you select.

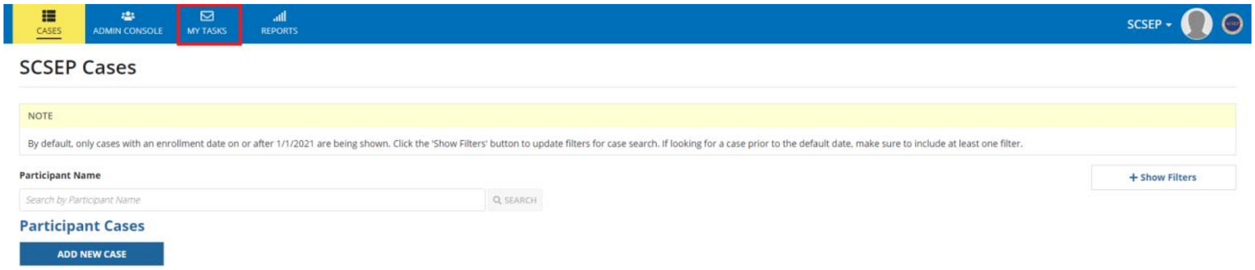


To Export an available county report, click on the **Download** icon next to **Quarter**. The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



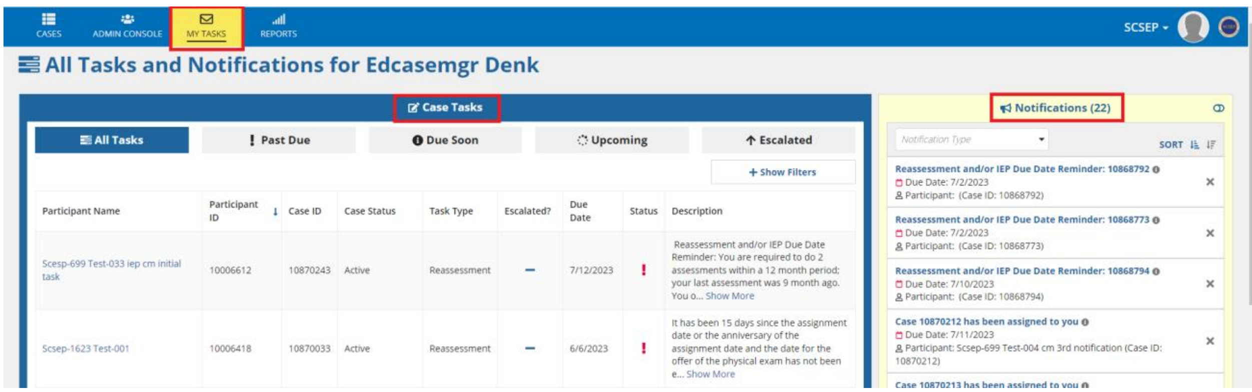
MY TASKS

All Notifications and assigned Tasks, such as Eligibility Approval and Eligibility Recertification, can be found in this section.



There are two sections under *MY TASKS*:

a. Case Tasks
b. Notifications



1. Tasks

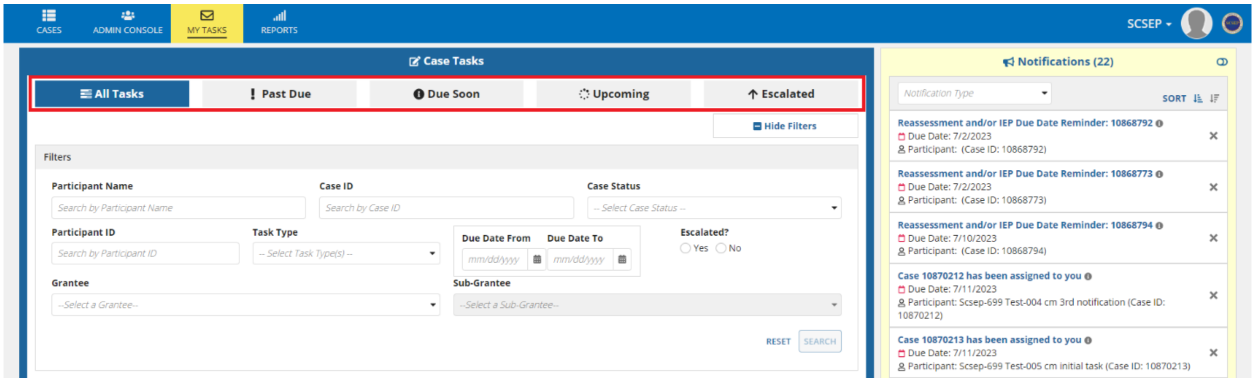
The Task console provides users the ability to view and manage tasks and notifications generated at various stages of the case management process. The screen contains a sub-screen with a blue border labeled **Case Tasks** on the left and a sub-screen with a yellow border labeled **Notifications** on the right. On the upper right corner of the Notifications sub-screen is an **Expand Notifications** switch that will expand the sub-screen to the full screen when clicked.

Depending on the user role, the Case Tasks and Notifications sub-screens may also have options to sort between Case-level and Grantee-level.

Five filter buttons appear below the title of the Case Tasks sub-screen:

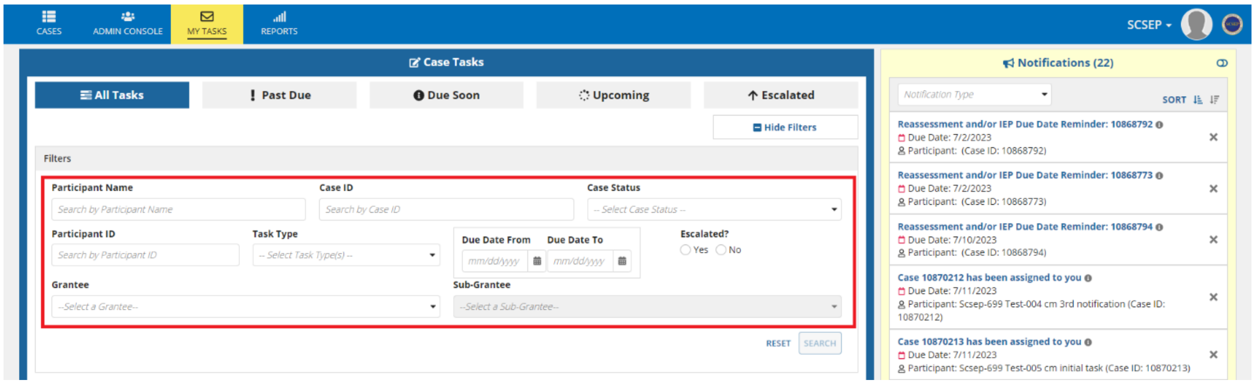
- **All Tasks** – All tasks assigned to the user appear.
- **Past Due** – Tasks that are past their assigned due date appear.
- **Due Soon** – Tasks that are two days or less from their due date appear.
- **Upcoming** – Tasks that are seven days or less from their due date appear.

- **Escalated** – Tasks that have been escalated from another user appear.



Below the filter buttons on the right of the Case Tasks sub-screen is a button labeled **Show Filters**. When clicked, the label on the button changes to **Hide Filters** and the following additional filter options appear:

- **Participant Name** – A text box that allows the user to search by participant name.
- **Case ID** – A text box that allows the user to search by Case ID.
- **Case Status** – A dropdown that allows the user to filter results based on one or multiple status categories.
- **Participant ID** – A text box that allows the user to search by Participant ID.
- **Task Type** – A dropdown that allows the user to filter results based on one or multiple task types.
- **Due Date From** – A date field that allows users to identify tasks with a due date *on or after* the entered date.
- **Due Date To** – A date field that allows users to identify tasks with a due date *on or before* the entered date.
- **Escalated?** – A set of radio buttons labeled **Yes** and **No**. The **Yes** button allows users to show tasks that have been escalated. The **No** button allows users to exclude tasks that have been escalated.
- **Grantee** – A dropdown that allows users to filter results based on the grantee that owns the case.
- **Sub-Grantee** – A dropdown that allows users to filter results based on the sub-grantee that owns the case. If no **Grantee** is selected, this dropdown is not accessible.
- Below the additional filters on the right of the Case Tasks sub-screen are two buttons labeled **RESET** and **SEARCH**.
    - The **RESET** button clears all filter values entered.
    - The **SEARCH** button applies the entered filters to the criteria of the search.

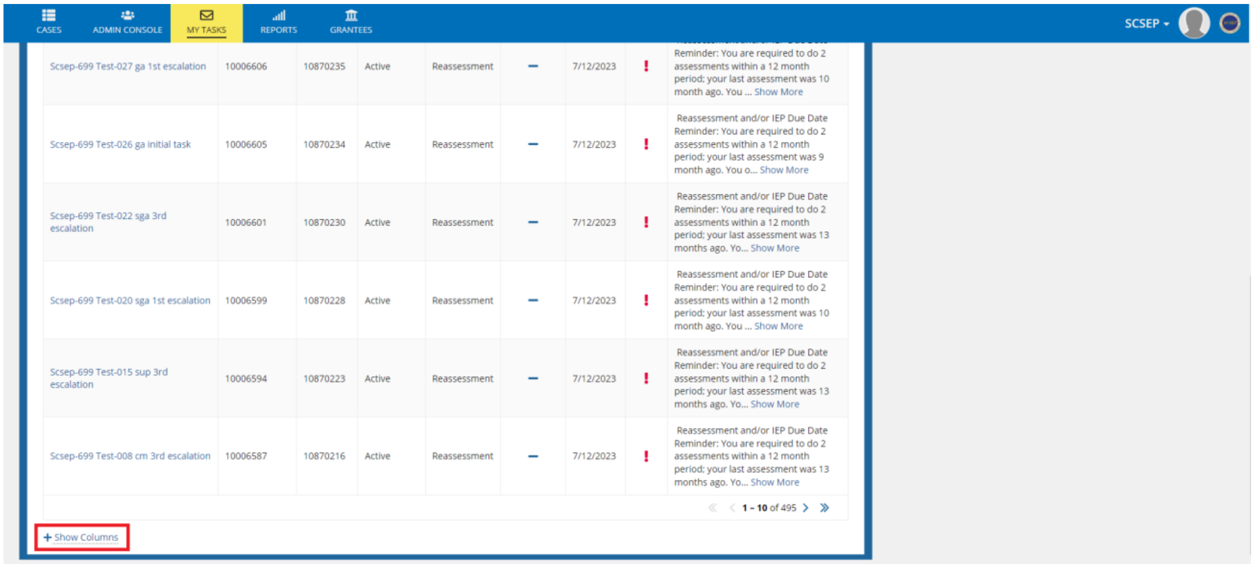


Tasks are displayed in a table format with the following default columns:

- **Participant Name** – The First Name and Last Name of the participant appears as hyperlinked text. When clicked, the user is redirected to the task screen for additional information.
- **Participant ID** – The participant ID of the case appears.
- **Case ID** – The Case ID of the case appears.
- **Case Status** – The Status of the case appears (Pending, Active, Exited, etc.).
- **Task Type** – The Task Type appears.
- **Escalated?** – If the task has been escalated to the user, the word **Yes** appears. Otherwise, a dash appears.
- **Due Date** – The due date of the task appears in the following format: MM/DD/YYYY.
- **Status** – A red information icon (**!**) appears in the column when the task is past due. The status of the task appears when the user hovers over the icon.
- **Description** – The description of the task and the action needed appear.

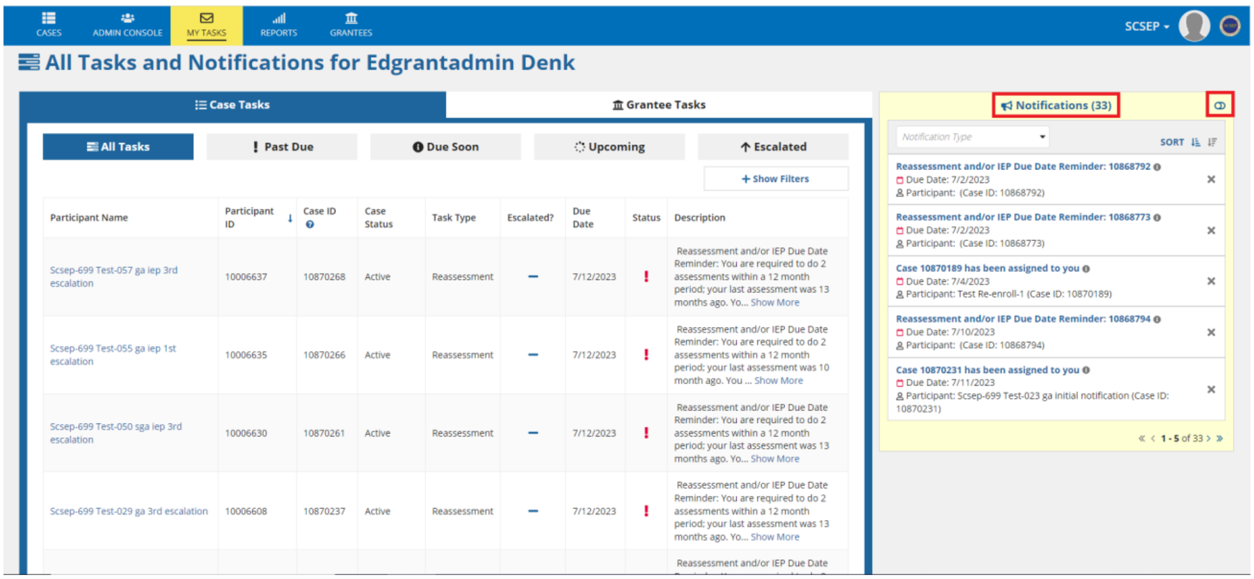
Almost all columns on the table allow users to sort by clicking on the column header. Clicking the header once sorts the tasks by that column in ascending order, and an up-pointing arrow appears in the header. Clicking the same header again sorts the tasks by that column in descending order, and a down-pointing arrow appears in the header.

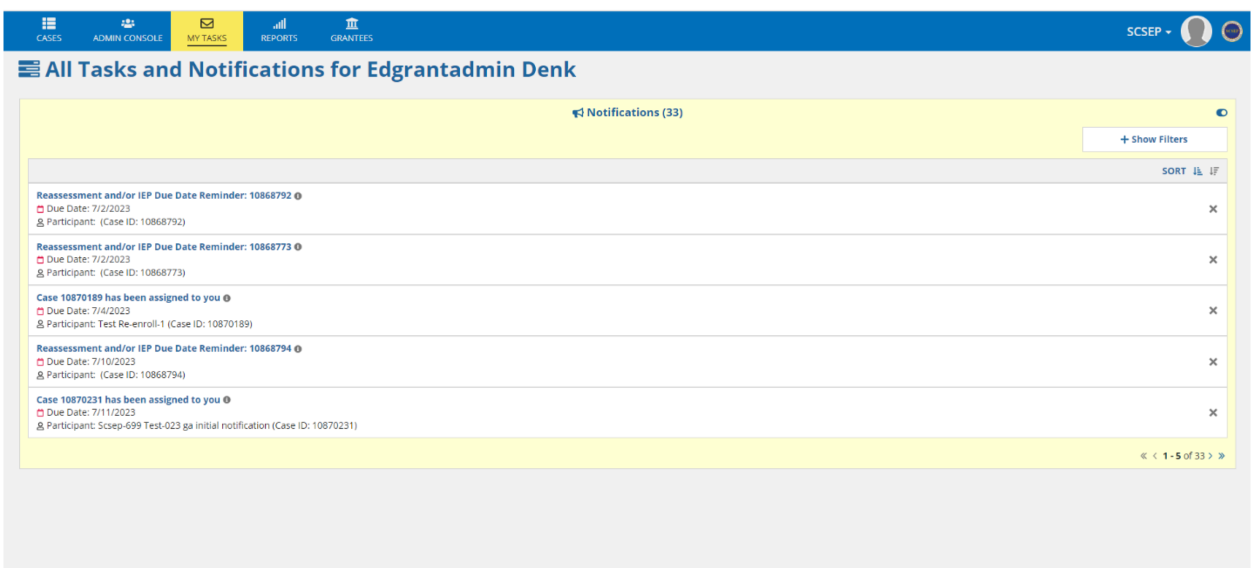
Below the table on the left of the screen the hyperlink text **Show Columns** appears. When clicked, the user can add or remove columns from the table. **Participant Name** is the only column that cannot be removed from the table.


CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES
SCSEP
Scsep-699 Test-027 ga 1st escalation
10006606
10870235
Active
Reassessment
7/12/2023
Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 10 month ago. You ... Show More
Scsep-699 Test-026 ga initial task
10006605
10870234
Active
Reassessment
7/12/2023
Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 9 month ago. You o... Show More
Scsep-699 Test-022 sga 3rd escalation
10006601
10870230
Active
Reassessment
7/12/2023
Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 13 months ago. Yo... Show More
Scsep-699 Test-020 sga 1st escalation
10006599
10870228
Active
Reassessment
7/12/2023
Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 10 month ago. You ... Show More
Scsep-699 Test-015 sup 3rd escalation
10006594
10870223
Active
Reassessment
7/12/2023
Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 13 months ago. Yo... Show More
Scsep-699 Test-008 cm 3rd escalation
10006587
10870216
Active
Reassessment
7/12/2023
Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 13 months ago. Yo... Show More
1 – 10 of 495
+ Show Columns

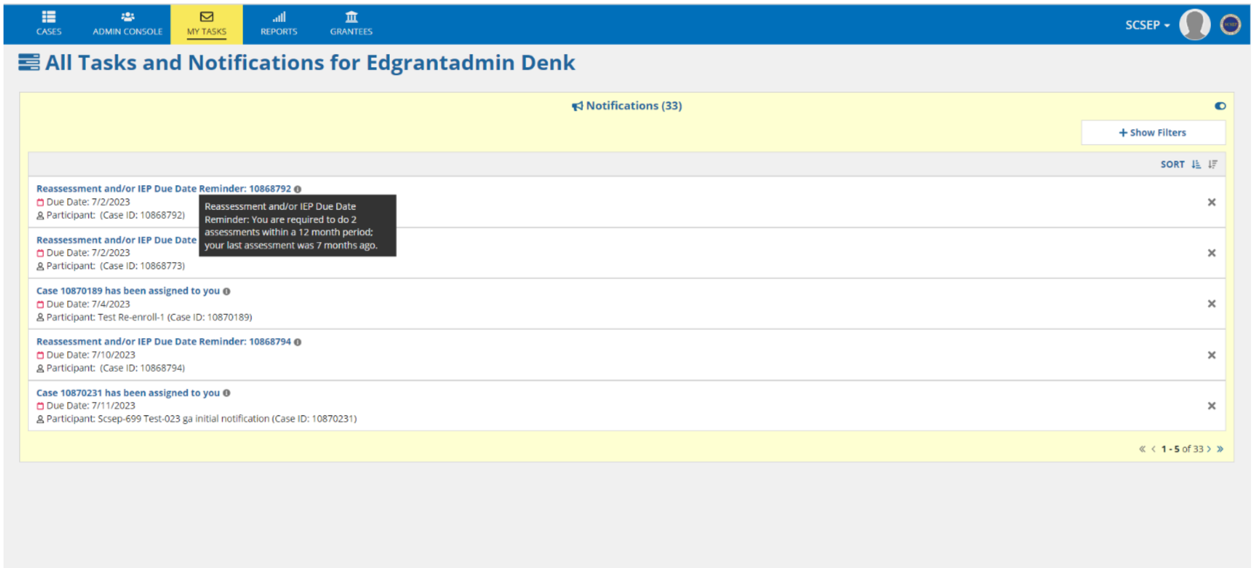
2. Notifications

The *MY TASKS* console provides users the ability to view and manage tasks and notifications generated at various stages of the case management process. Grantee Admin users and Program Analysts will have Case Notifications and Grantee Notifications headers above their Notifications tab that can be toggled to sort between these two notification types.



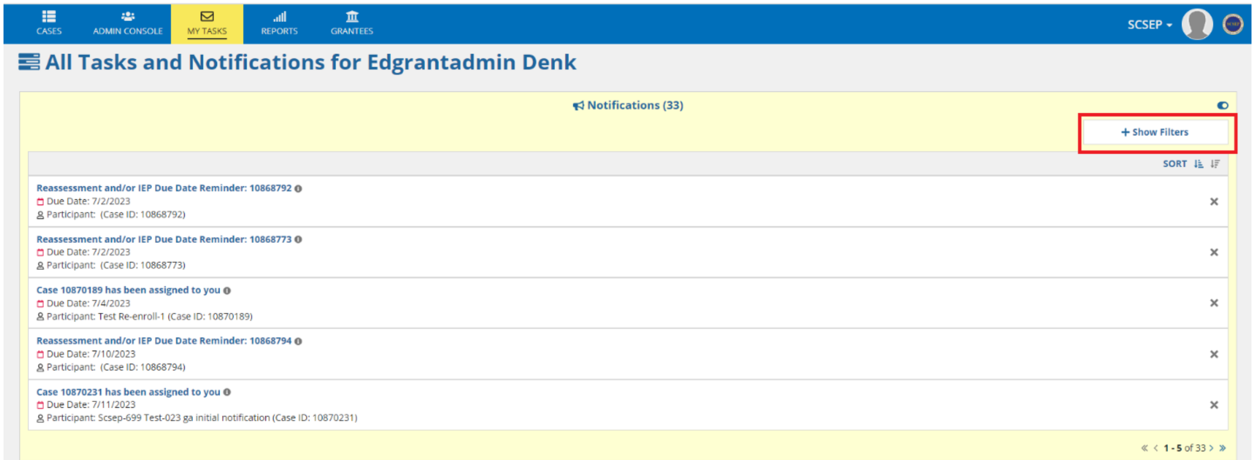


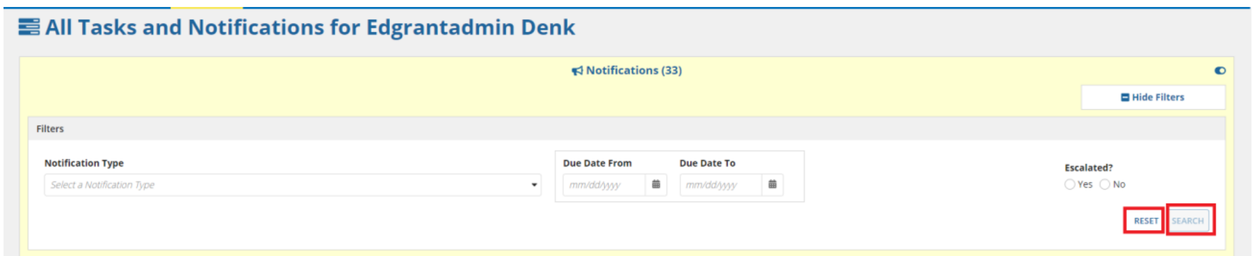
The title of each notification is hyperlinked text. When clicked, the user is redirected to the notification screen for additional information. After the title of each notification an icon (i) appears that provides additional details on the notification when clicked.



When expanded, on the right of the Notifications sub-screen is a button labeled **Show Filters.** When clicked, the label on the button changes to **Hide Filters** and the following additional filter options appear:

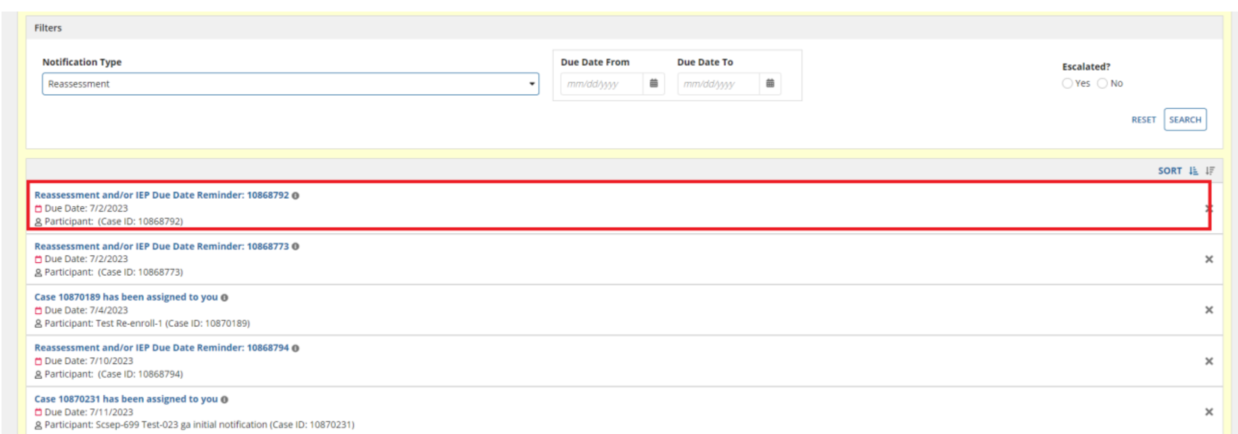
- **Notification Type** – A dropdown that allows the user to filter results based on one or multiple Notification types.
- **Due Date From** – A date field that allows users to identify notifications with a due date *on or after* the entered date.
- **Due Date To** – A date field that allows users to identify notifications with a due date *on or before* the entered date.
- **Escalated?** – A set of radio buttons labeled **YES** and **NO**. The **YES** button allows users to show notifications that have been escalated. The **NO** button allows users to exclude notifications that have been escalated.





Notifications are listed below the filters in the following format:

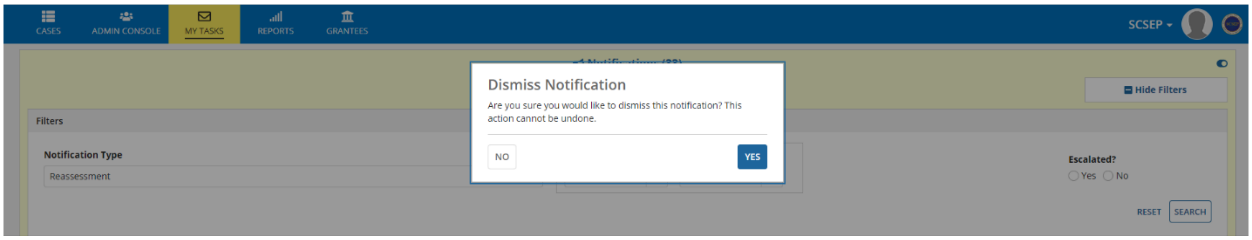
5. **[Name of Notification]: [Case ID]**
6. Due Date: [M/D/YYYY]
7. Participant: [Participant Name] (Case ID: [Case ID])



An **X** appears on the right of each notification. When a user clicks the **X**, the following message appears in a prompt window:

Are you sure you would like to dismiss this notification? This action cannot be undone.

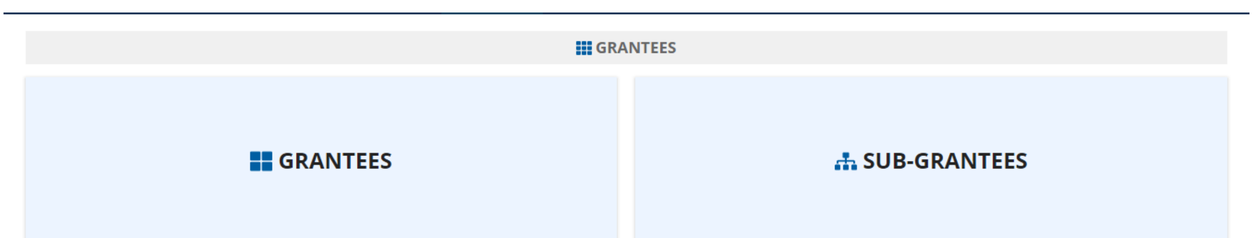
If the user clicks **YES**, the notification is removed from the list. If they click **NO**, this prompt simply disappears.



Users can click a notification in this list to view the Participants Summary and take appropriate action. Once that action is taken, the notification will no longer be displayed.

Grantees

In this section, summary of Grantee, Sub-Grantee, and Related Actions of Grantees can be found. Only Program Analysts can add grantees, sub-grantees and grant numbers. Grantee Admins can utilize search functionality but cannot edit information.



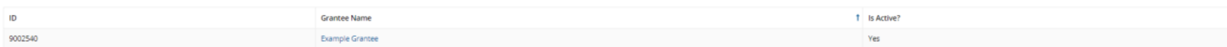
The *GRANTEES* tab has two Sub-Sections:

- GRANTEES
- SUB-GRANTEES

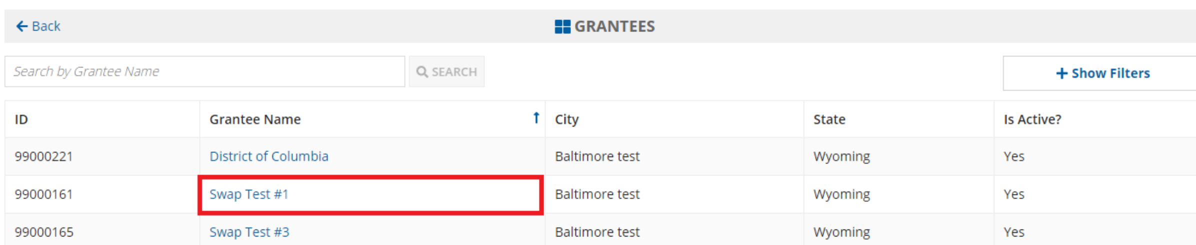
1. Grantees

You can search for a Grantee by entering their name in the search box and clicking **SEARCH**.

After you run a search, the ID, Grantee Name and if the Grantee **Is Active** are displayed. The **Is Active?** column will read No when a grantee has been retired.

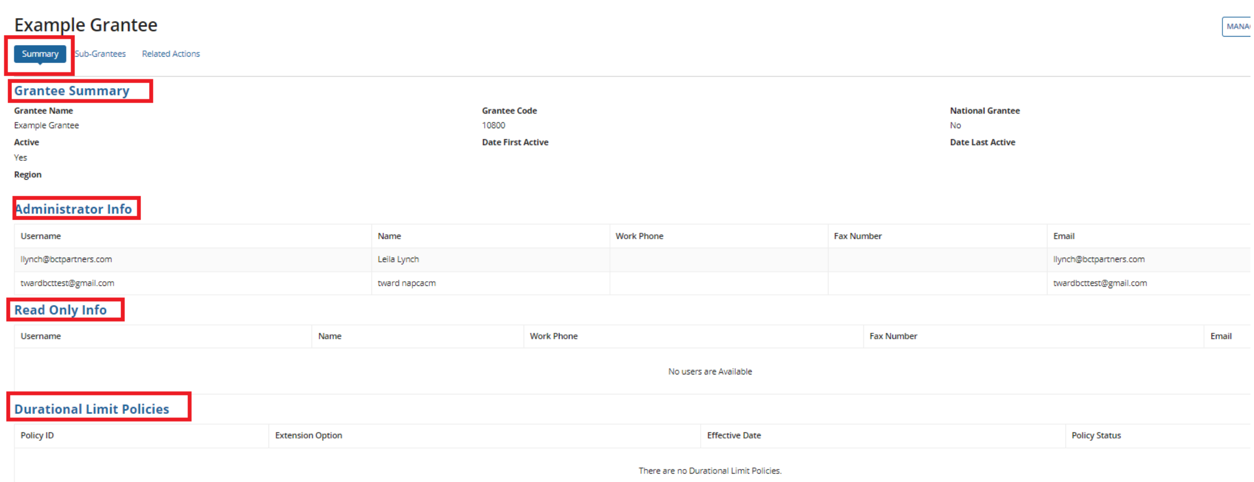


Click on the **Grantee Name** in the grid to view the Summary, Sub-Grantees, and their Related Actions.



1.1 Summary

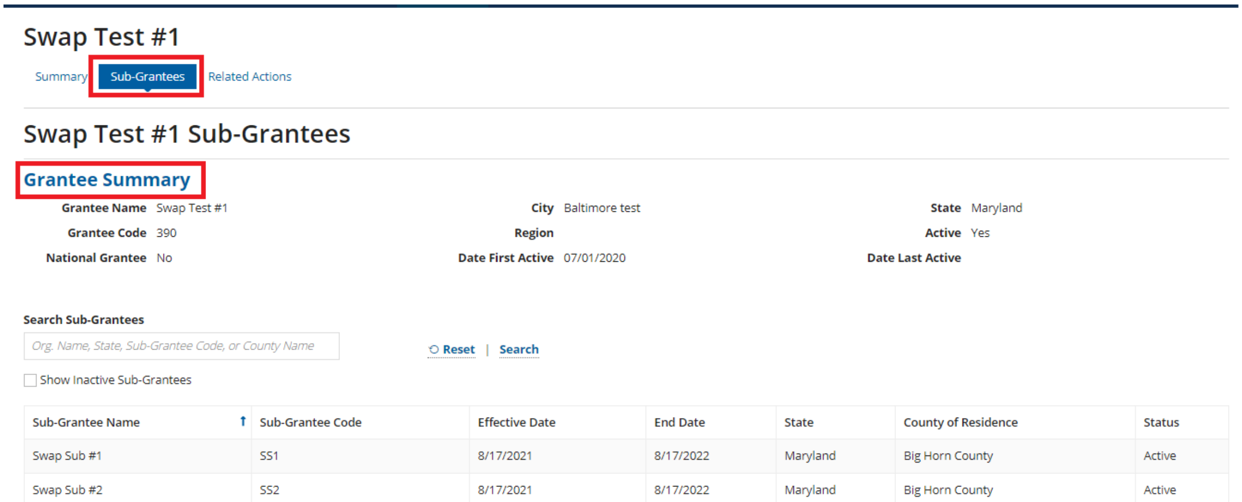
You can select the **Summary** button to display a summary of the Selected Grantee, the Administrator Info, Read Only Info, and the Durational Limit Policies.



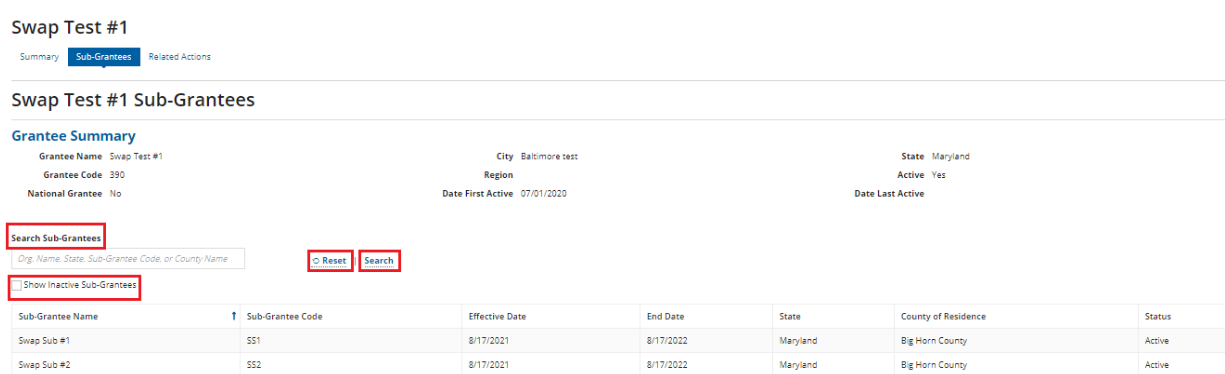
1.2 Sub-Grantees

A Grantee Admin or Program Analyst can view Sub-Grantees linked to a Grantee using this sub-heading in the Grantee section. When clicked, the user will see Grantee summary information in addition to a search bar labeled **Search Sub-Grantees**.

Details of the Sub-Grantees for the selected Grantee are available in this section. The selected Grantee Summary is displayed at the top of the screen.



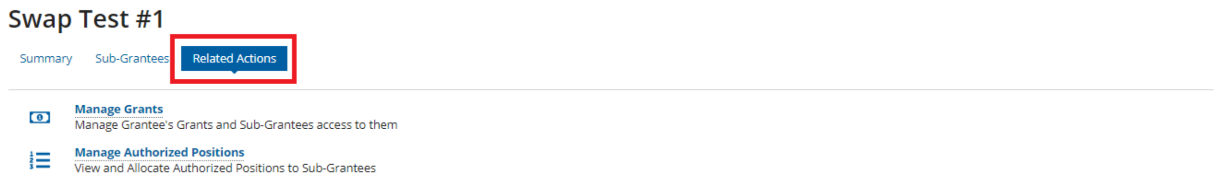
Sub-Grantees can be displayed by entering a name in the text field and clicking **Search**. Click **Reset** to clear the data entered and start a new search. The results of the search can be filtered by selecting **the Show Inactive Sub-Grantees** checkbox**.**



The data displayed is read only. No edits can be made by the Grantee Admin user.

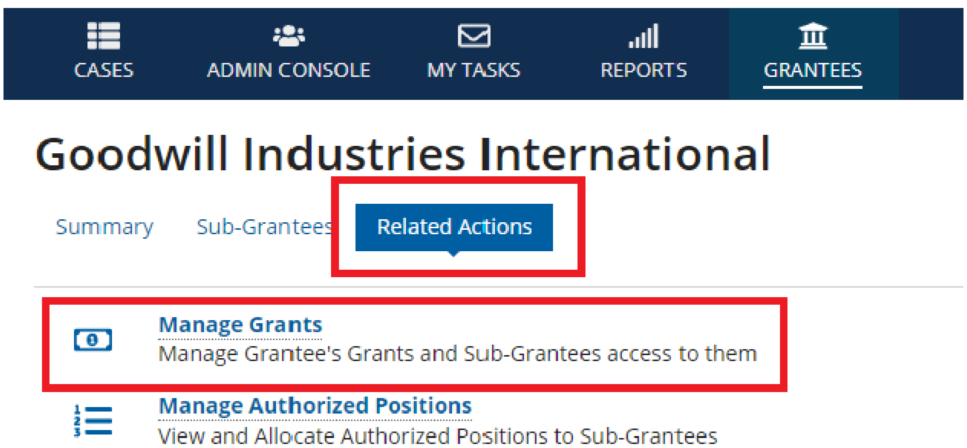
1.3 Related Actions

Related Actions that can be taken by the Grantee Admin and Program Analyst are found in this section.

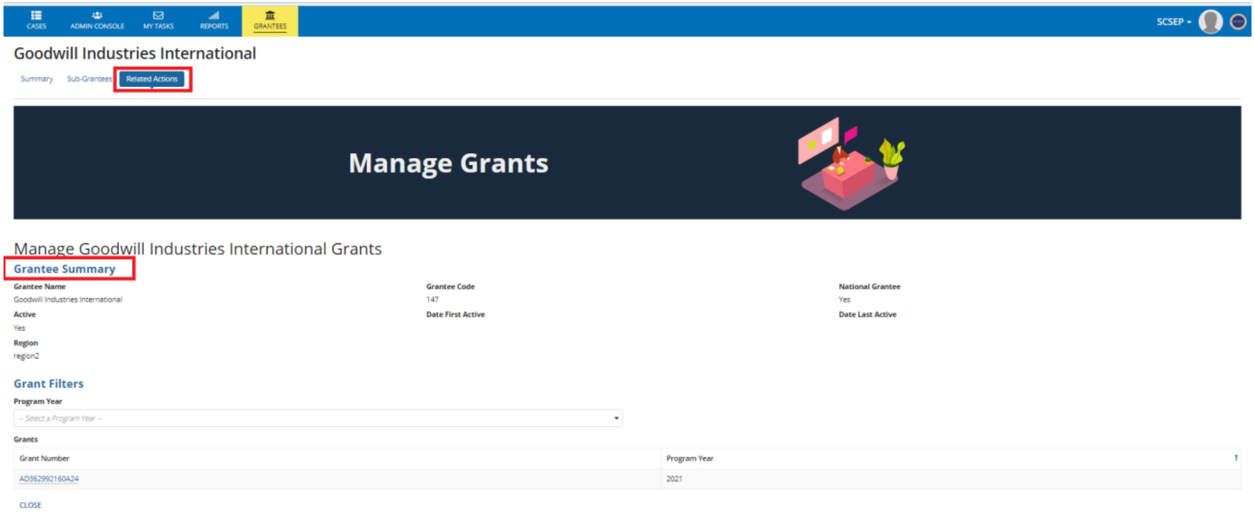


1.4 Manage Grants

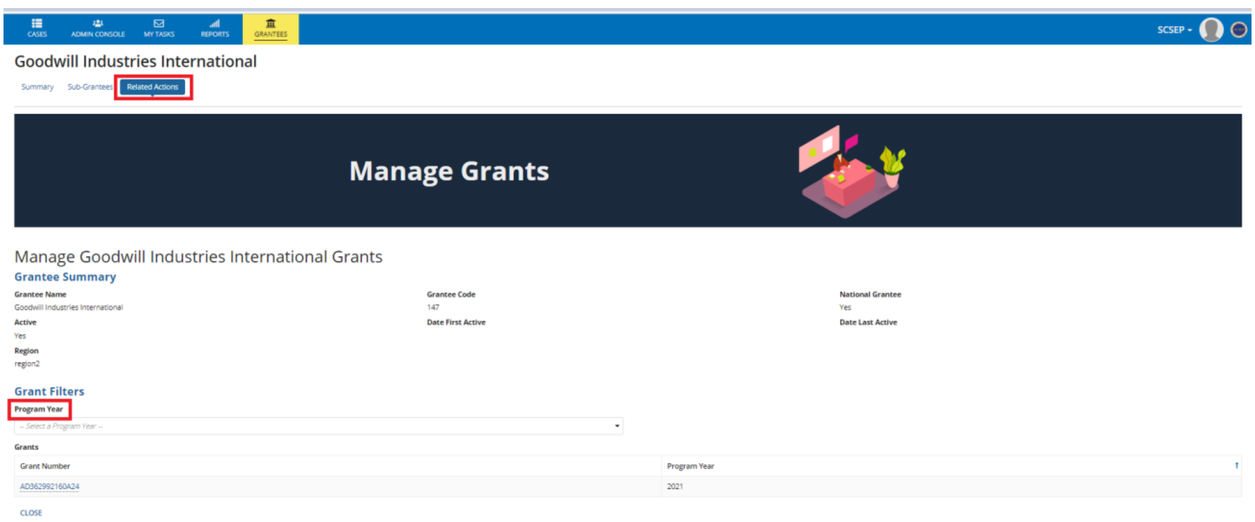
Grantees and Sub-Grantees can manage their grant's information and activity here. Functions in this module include adding a new grant and editing an existing grant.



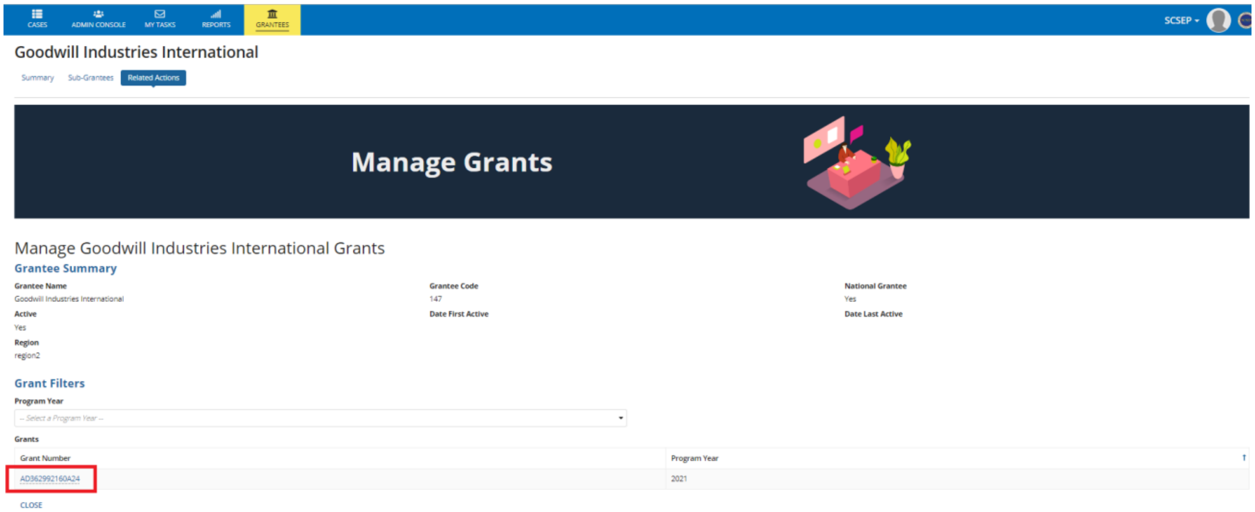
The **Grantee Summary** is found at the top section.



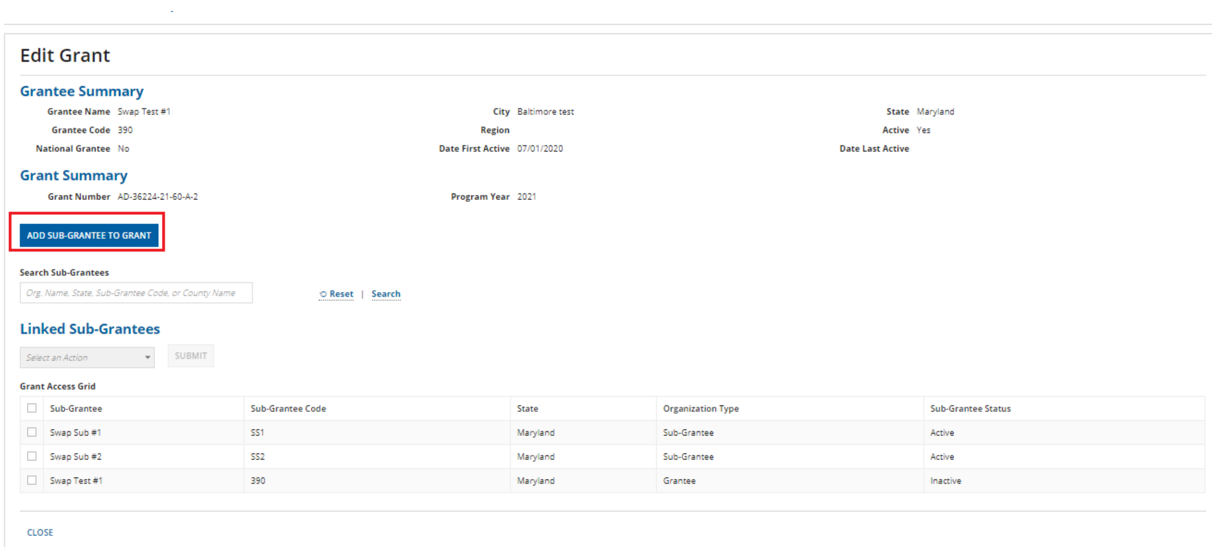
To filter a Grant by Program Year, select a **Program Year** from the dropdown menu. The results will display on the screen below the dropdown menu.



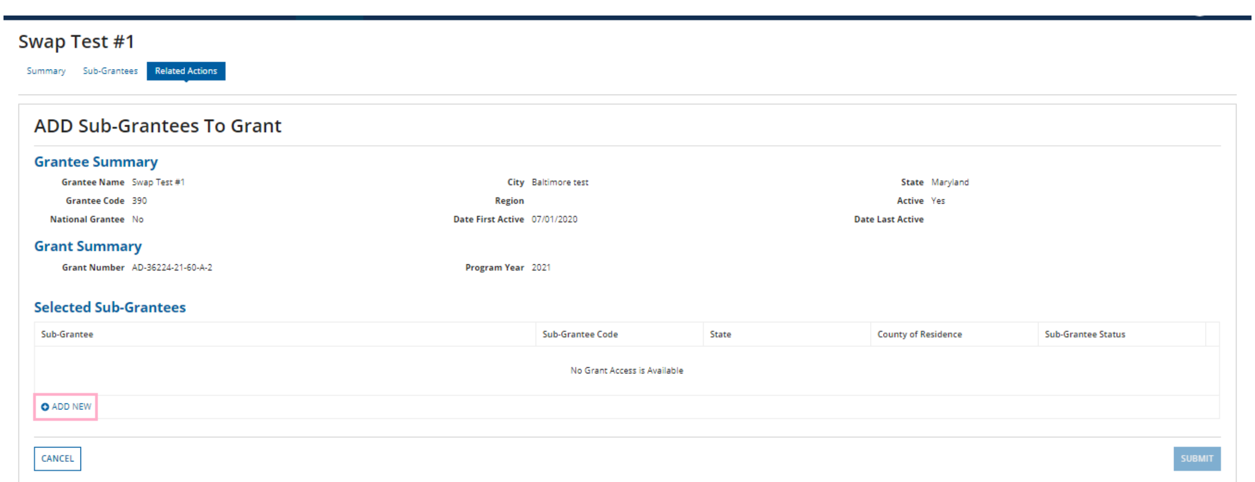
Select a **Grant Number** in the grid to view details.



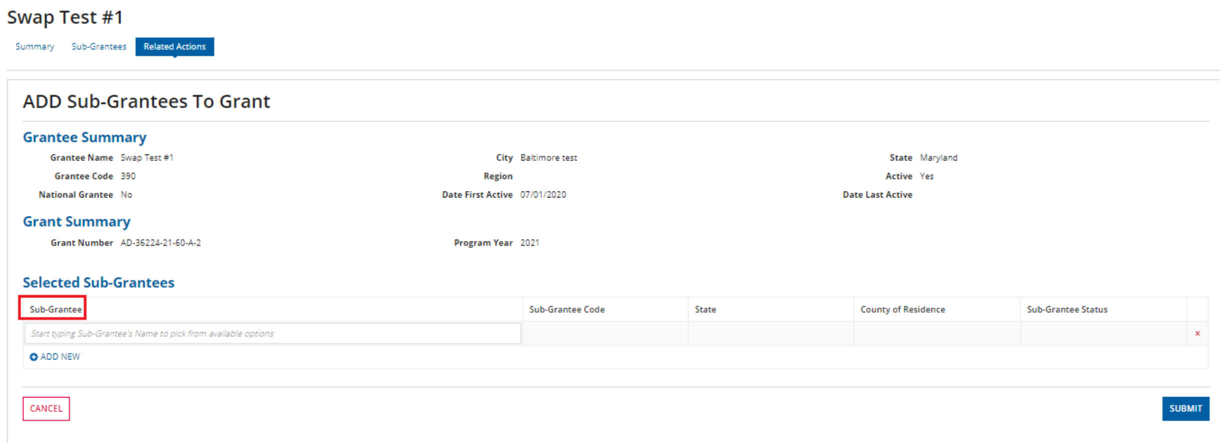
To add a new Sub-Grantee to the selected Grant, click **ADD SUB-GRANTEE TO GRANT**.

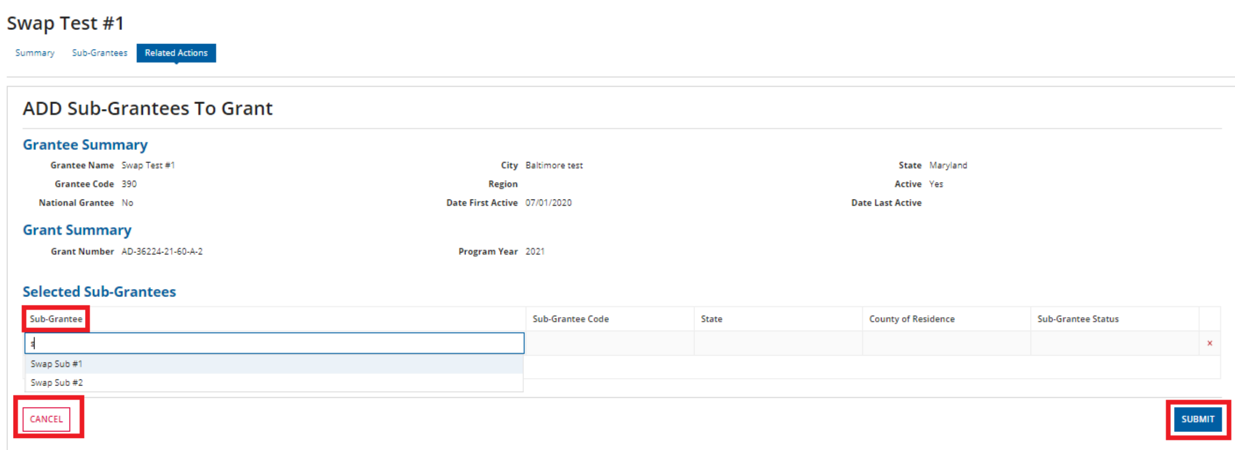


Click **ADD NEW**.



You can search for a Sub-Grantee by entering its name in the search box.

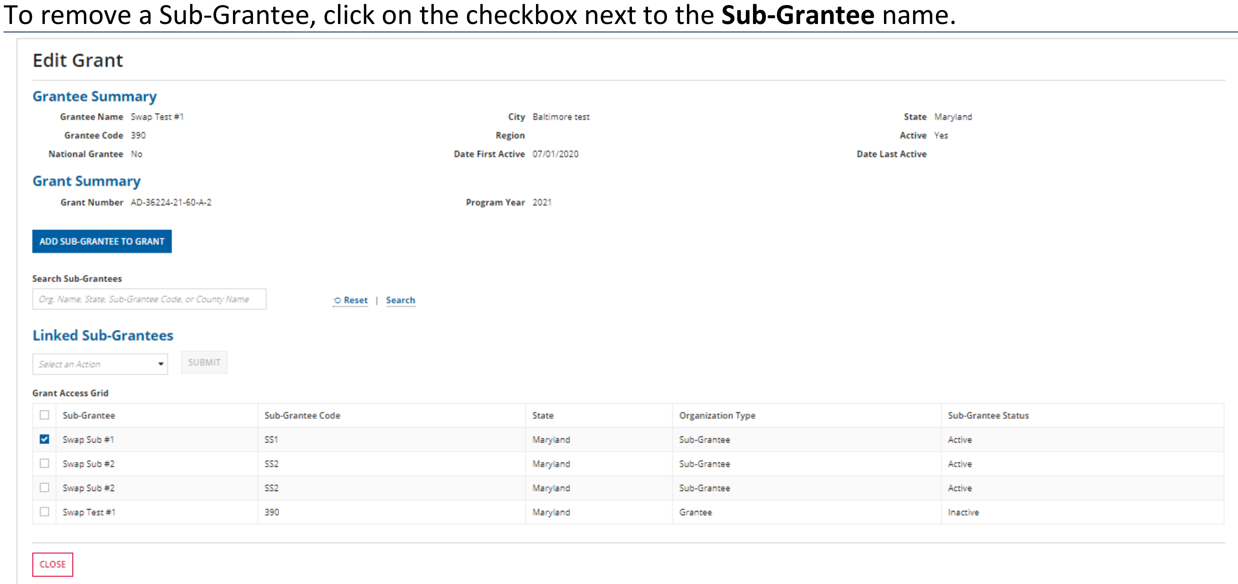




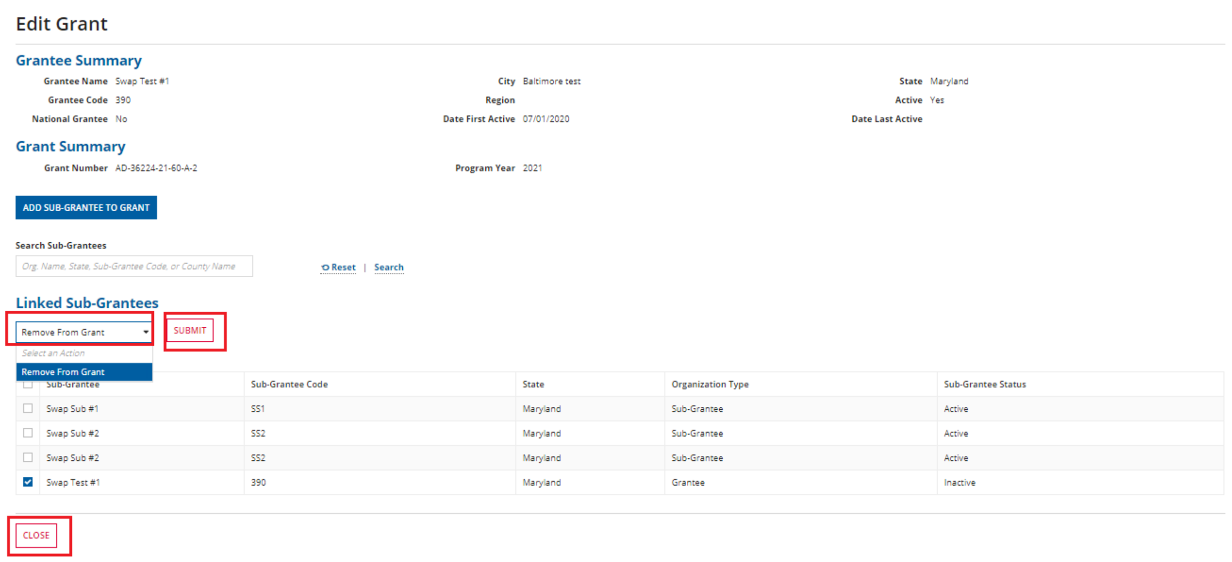
Click **SUBMIT** to save the chosen option.

Or, click **CANCEL** to discard the selection.

To remove a Sub-Grantee, click on the checkbox next to the **Sub-Grantee** name.

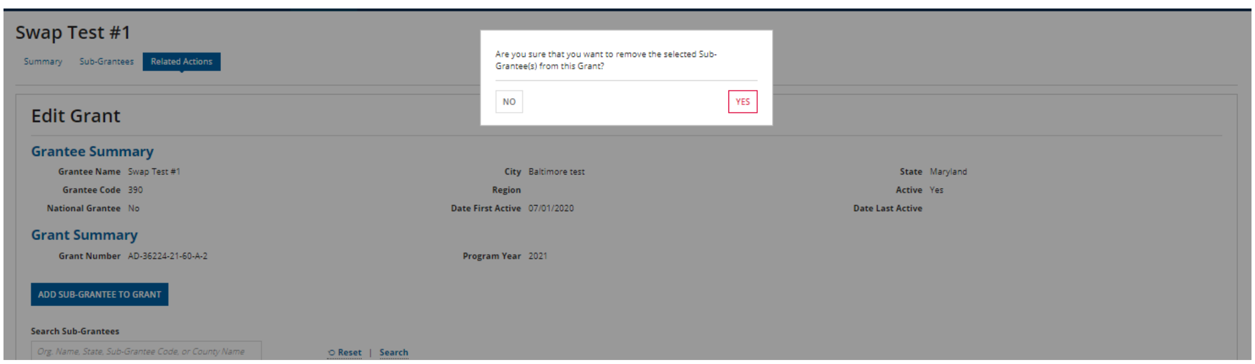


Select **Remove From Grant** from the drop down and click **SUBMIT**.



A confirmation message is displayed: Are you sure that you want to remove the selected Sub-Grantee(s) from this Grant?

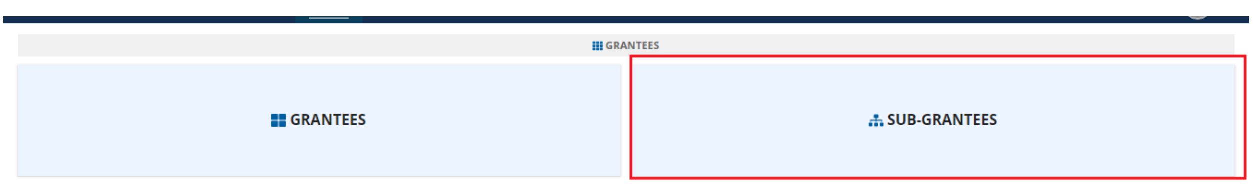
Click **YES** to continue with the selected action. Click **NO** to cancel the selected action.



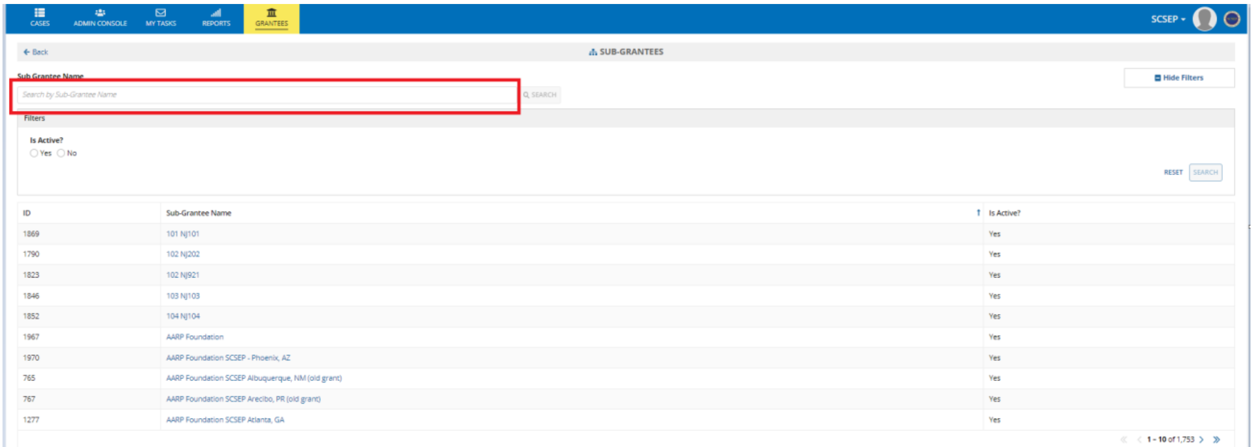
2. Sub-Grantees

Sub-Grantees' information and activity can be managed on this screen. Managing your grant includes functions such as editing an existing Sub-Grantee, adding a new Sub-Grantee, updating an existing one, etc.

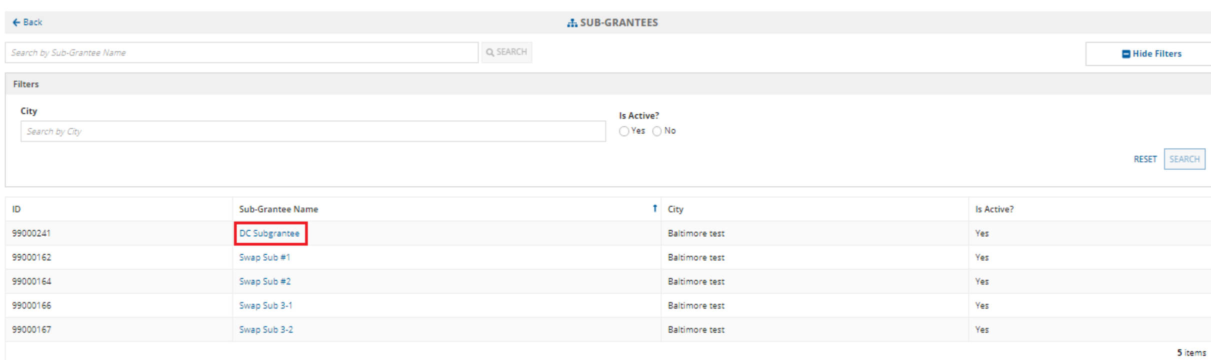
A summary of the *SUB-GRANTEES* and their related actions are found in this section.



Sub-Grantee can be searched by entering their name in search box and clicking **SEARCH**. The search results will populate below the dropdown menu.



To view the **Summary** click on the **Sub-Grantee Name** in the grid.



After you select the sub-grantee you wish to view, the **Sub-Grantee Summary** and **Administrator Info** will be displayed.