



Employment and Training Administration (ETA)

Senior Community Service Employment Program (SCSEP)

Grantee Performance Management System (GPMS)

User Guide for Grantees

Version 1.5

January 2024

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.mech@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.com

DOCUMENT INFORMATION

Title:	SCSEP GPMS User Guide
Revision:	Release 0.05
Issue Date:	January 2024
Contract Number:	1605DC-17-C-0014
Doc Type:	Non-Contractual
Doc Classification:	For Official Use Only

Table of Contents

SUMMARY OF CHANGES	7
INTRODUCTION	8
Goals of SCSEP	8
Services Provided to SCSEP Participants	8
CASE MANAGEMENT OVERVIEW	9
DOCUMENT OVERVIEW.....	9
HELP DESK	9
SCSEP GPMS CORE FUNCTIONAL REQUIREMENTS	9
USER ROLES	10
CASE STATUS	11
UNIVERSAL FEATURES	12
Tabs 12	
Navigation Buttons.....	13
Dropdowns.....	13
Field-Level Help.....	13
Required Fields.....	13
Calendar Buttons.....	13
Upload Documents.....	14
Grids 14	
Error and Date Validation Messages.....	14
START UP.....	14
NAVIGATING SCSEP.....	18
SCSEP CASES	18
1. Add New Case	20
1.1 Intake.....	21
1.2 Eligibility	27
1.3 Characteristics.....	31
1.4 Other Enrollment Information	36
1.5 Intake Checklist	38
2. Add Assignment	39

3. Add Service.....	45
4. Breaks.....	48
4.1 Add Break.....	48
4.2 Delete Break.....	51
5. Manage Paid Hours	51
6. Participant Required Actions.....	52
6.1 Orientation Details	53
6.2 Offer of Physical Exam	54
6.3 Safety Consultation Details	55
6.4 Assessment Details.....	55
7. Participant History.....	56
8. Related Actions	58
8.1 Manage Waiver Factors	58
8.2 Manage Extensions	60
8.3 Add Exit	61
8.4 Add Placement	64
9. Right of Return	67
10. Manage Follow-Ups	69
11. Add Placement-Related Service	70
12. Move/Transfer Case	73
12.1 Move Case.....	73
12.2 Transfer Case.....	75
13. Recertify Case.....	77
ADMIN CONSOLE	85
1. Durational Limit Extension Utility	86
2. Manage Grants.....	89
2.1 Associate Sub-Grantees to Grant.....	91
2.2 Remove Sub-Grantees from Grant.....	93
3. Manage Users.....	94
3.1 Add User	95
3.2 Update User	97
3.3 Add Read Only User	99
4. Manage Authorized Positions	101
5. Generate Internal QPR Reports.....	104
6. Manage Paid Hours	106

7. Participants Waiver Factor	111
8. Participant Search	114
9. Participant Wait List	117
10. Manage Organizations and Contacts	120
10.1 Search for An Organization	121
10.2 Add an Organization.....	121
10.3 Edit an Organization.....	127
10.4 Add Additional Contacts.....	127
11. Manage Eligibility Task Assignment	128
12. Extracts	129
13. Nationwide QPR Report	131
REPORTS	132
1. User Organization.....	133
1.1 Participant Current/Exit Detail.....	135
1.2 Approved Breaks in Service.....	142
1.3 Durational Limit Extension	145
1.4 Waiver of Durational Limit Report	145
1.5 Participant/Case Extract Report.....	152
1.6 Participant Hours Report.....	155
2.0 Actions.....	163
2.1 Participant Actions Report	163
2.2 Most in Need/Waiver Factor Actions Report.....	167
2.3 Follow-Up Reports.....	172
2.4 Assignment by Host Agency Report	176
3.0 Employers.....	181
3.1 Customer Satisfaction Survey	181
3.2 County Reports.....	182
2. Equitable Distribution (ED) Report.....	185
MY TASKS	188
1. Tasks	189
2. Notifications	192
GRANTEES	195
1. Grantees	195
1.1 Summary	196

1.2 Sub-Grantees.....	197
1.3 Related Actions	197
1.4 Manage Grants.....	198
2. Sub-Grantees.....	202

SUMMARY OF CHANGES

DATE	DESCRIPTION
01-20-23	<p>The updated user guide includes guidance and information on:</p> <ul style="list-style-type: none">• 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. <p>Information surrounding various forms was also updated to reflect the current state of the application.</p>
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 the application 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

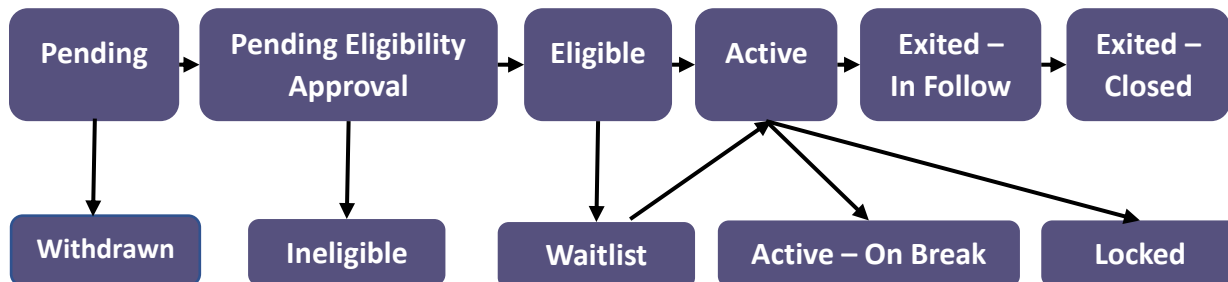
Within the **SCSEP GPMS**, the following **User Roles** are identified:

Role Name	Abilities
Case Manager	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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. 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. Ability to create Users with any role except another Sub-Grantee Administrator or Grantee Administrator. Ability to assign/reassign cases to Case Managers.
Grantee Administrator	<ul style="list-style-type: none"> 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. 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. Ability to create Users with any role except another Grantee Administrator. Ability to assign/reassign cases to Case Managers.
Program Analyst	<ul style="list-style-type: none"> Program Analysts are those users located within the National Program Office. Ability to add Grantee Administrators.

Role Name	Abilities
	<ul style="list-style-type: none"> Ability to view all Grantee Organizations. Ability to designate the Grantee Administrators. Ability to delete a case. NOTE: Only Program Analysts can view or edit (PII) information after it has been entered/saved in the application.
Read Only Global	<ul style="list-style-type: none"> User will have View Access to all the Grantee/Subgrantee information GPMS. 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. User can view all Cases, Tasks, Limited access to Admin Console and Reports. User can create and export reports, however, cannot export the extracts. Does not have the ability to create cases or edit existing cases.
Read Only Restricted	<ul style="list-style-type: none"> User has the same access as Read Only Global but only for their <i>specific grantee</i>.

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 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 <u>has not been approved</u> .
Eligible	Case Status is updated to Eligible when an Eligibility approval has been granted by the Case Supervisor .
Ineligible	Case Status is updated to Ineligible if the Case Supervisor deems the Case to be disqualified due to specific program requirements.

Status	Description
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**.

**DOL IT
PLATFORM**

You are accessing a U.S. Government information system that is owned and operated by the Department of Labor. THERE IS NO EXPECTATION OF PRIVACY WHEN ACCESSING THIS SYSTEM. The Department of Labor information systems are provided for the processing of official U.S. Government information only, and are therefore, owned by the Department of Labor. Authorized users are responsible for the proper handling of the Government data equipment and resources which they access.

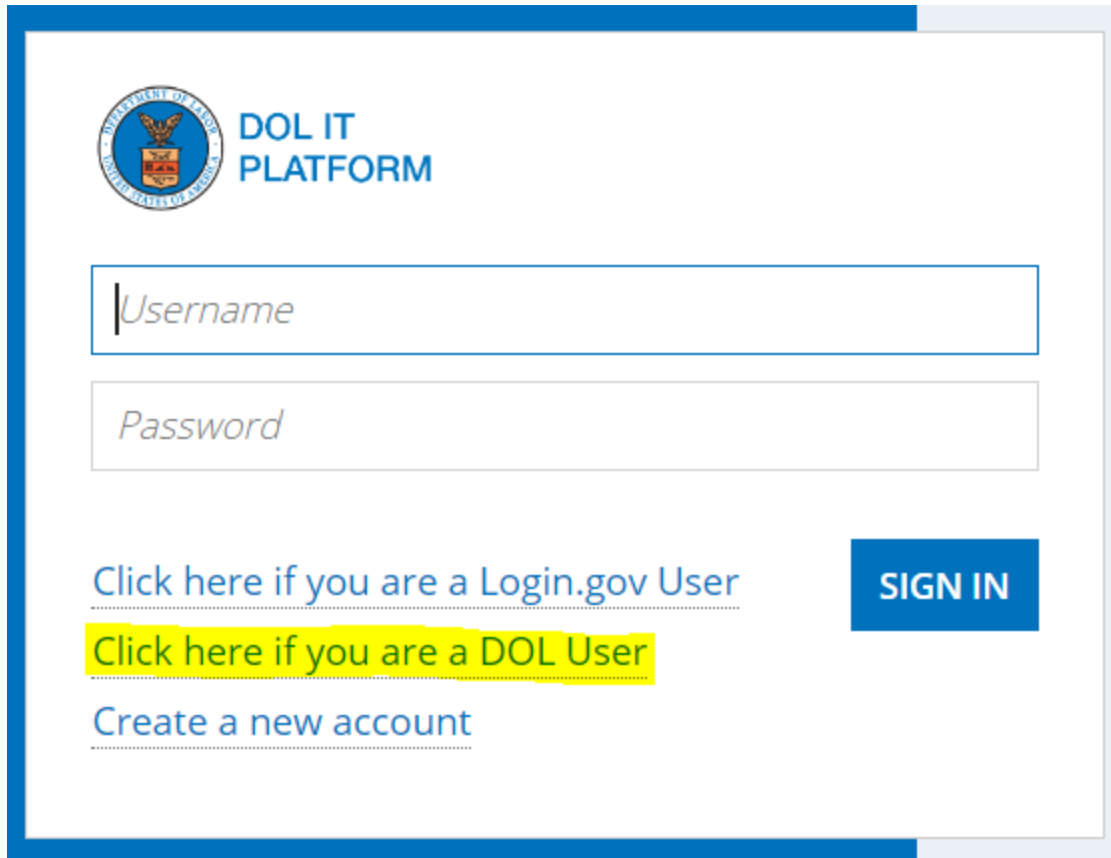
USE OF THIS SYSTEM BY ANY USER AUTHORIZED OR UNAUTHORIZED CONSTITUTES A CONSENT TO THIS MONITORING, RECORDING, DISCLOSURE, AND ACCEPTS THAT USE OF THE SYSTEM IS SUBJECT TO AUDIT BY AUTHORIZED PERSONNEL.

Fraud and related activity in connection with computers is prohibited by Title


I AGREE

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.



The image shows a sign-in dialog box for the DOL IT Platform. It features the Department of Labor seal and the text "DOL IT PLATFORM". There are two input fields: "Username" and "Password". Below the input fields, there are three links: "Click here if you are a Login.gov User", "Click here if you are a DOL User" (highlighted in yellow), and "Create a new account". A blue "SIGN IN" button is located to the right of the links.

 **DOL IT
PLATFORM**

[Click here if you are a Login.gov User](#)

[Click here if you are a DOL User](#)

[Create a new account](#)


SIGN IN


Sign In Dialog Box

The DOL Case Management Platform screen will be displayed.

4. Go to the Sign in for existing user section of the DOL Case Management Platform screen.

An official website of the United States government [Here's how you know](#) ▼

LOGIN.GOV 



DOL Case Management Platform
is using Login.gov to allow you to
sign in to your account safely and
securely.

Sign in for existing users

Email address

Password

☐ Show password

Sign in

Login page

5. Enter the **Username** and **Password**.
6. 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)

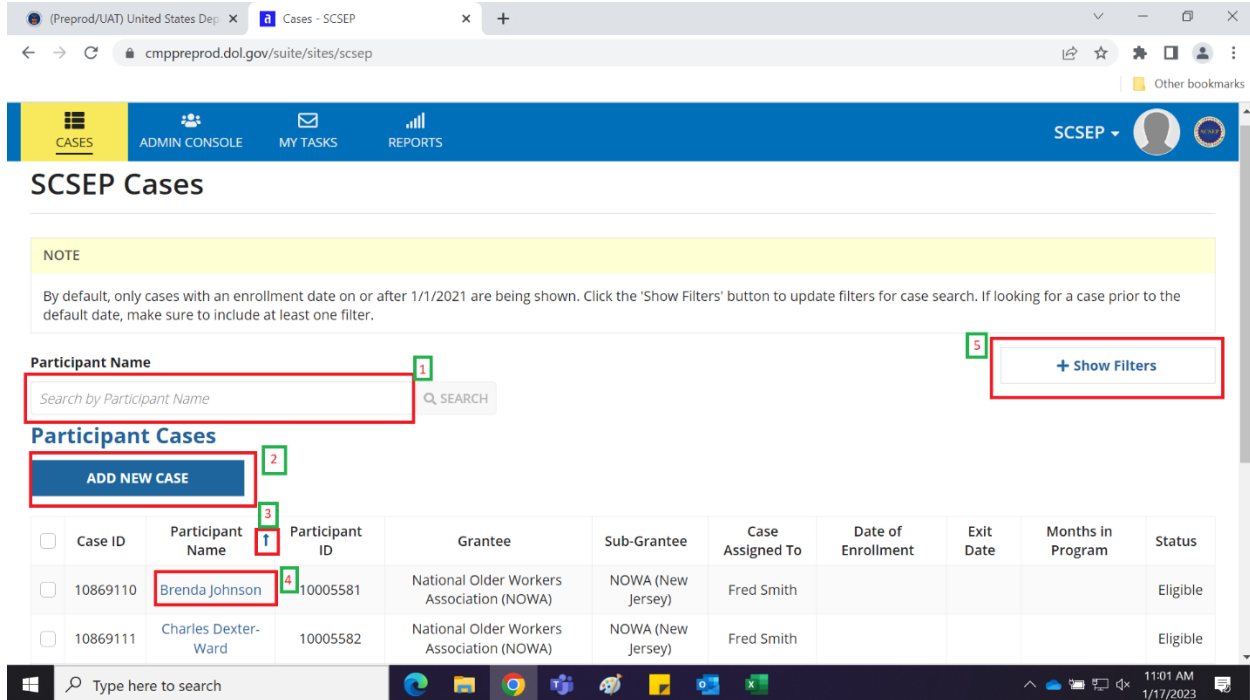
The **CASES** tab brings the user to the **SCSEP Cases** screen. The **SCSEP Cases** screen displays a grid of SCSEP participant cases currently or previously enrolled within the user's grantee(s) and sub-grantee(s).

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.



SCSEP Cases

NOTE

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.

Participant Name 1

Search by Participant Name

Participant Cases

ADD NEW CASE 2

	Case ID	Participant Name	Participant ID	Grantee	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
<input type="checkbox"/>	10869110	Brenda Johnson 4	10005581	National Older Workers Association (NOWA)	NOWA (New Jersey)	Fred Smith				Eligible
<input type="checkbox"/>	10869111	Charles Dexter-Ward	10005582	National Older Workers Association (NOWA)	NOWA (New Jersey)	Fred Smith				Eligible

+ Show Filters 5

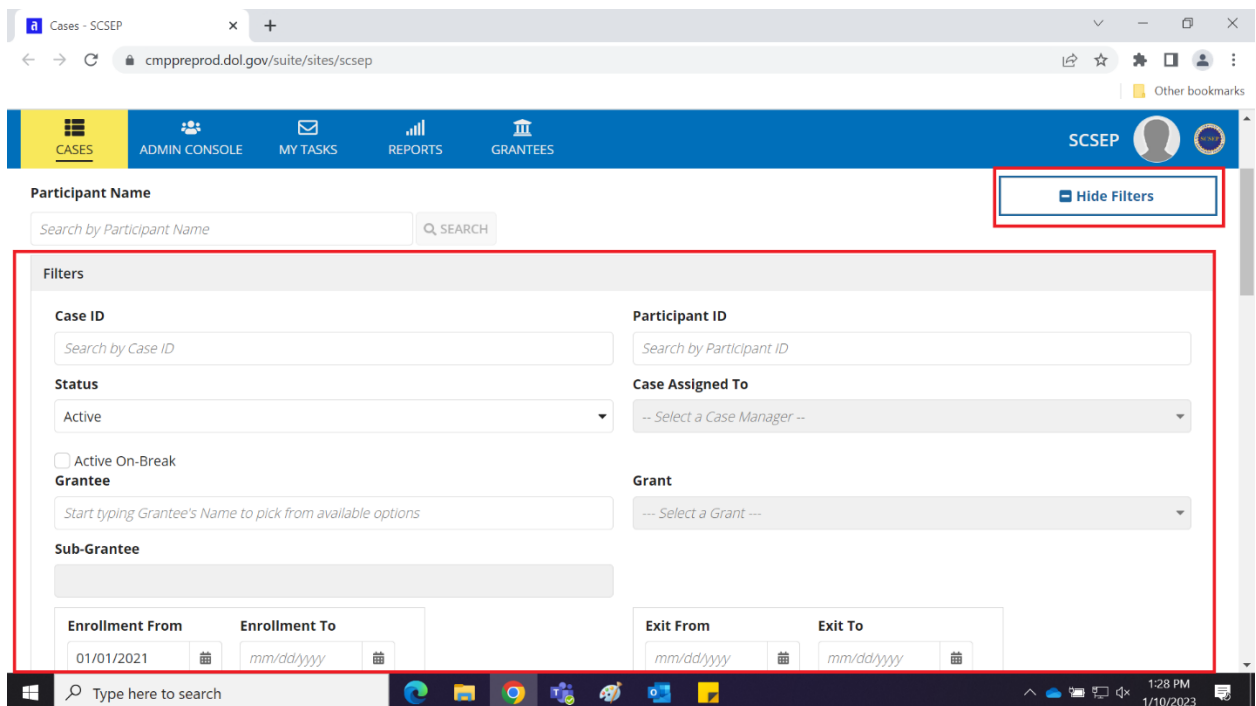
Each of the functionalities available under the **CASES** tab will be discussed in the sections related to the case entry and development/handling process.

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.



The screenshot displays the SCSEP Cases application interface. At the top, there is a navigation bar with tabs for 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS', and 'GRANTEES'. Below the navigation bar, there is a search bar labeled 'Participant Name' and a 'Hide Filters' button. The main area contains a 'Filters' section with various search criteria: Case ID, Participant ID, Status (Active), Case Assigned To, Grant, Sub-Grantee, Enrollment From/To, and Exit From/To. The 'Enrollment From' field is populated with '01/01/2021'.

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.

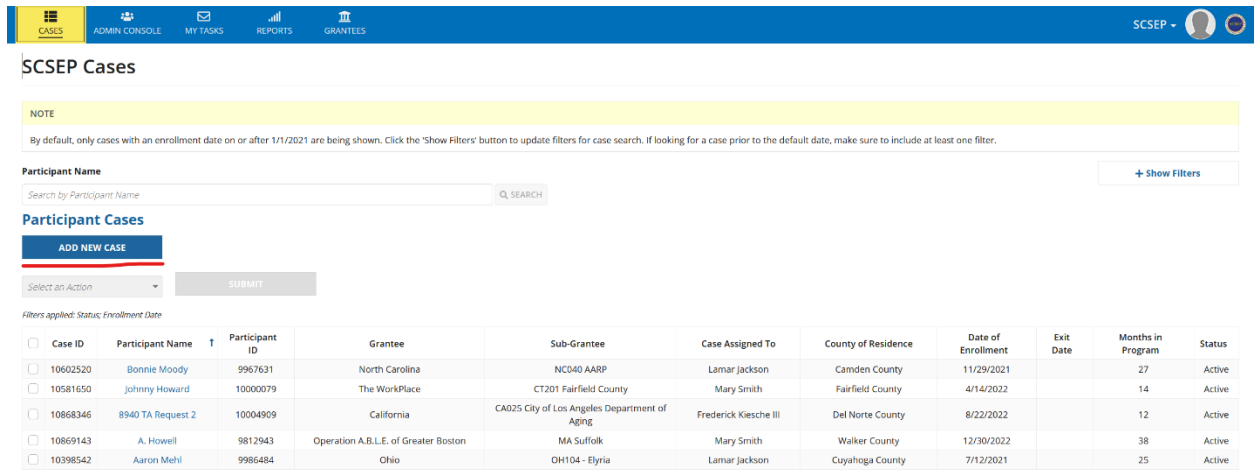
Some fields provide additional information regarding how they are populated. In these cases, the hyperlinked text **Show Detailed Instructions** displays below the field. When clicked, a text box displays additional information regarding the field. The text will also change to **Hide Instructions**.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



SCSEP Cases

NOTE
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.

Participant Name
Search by Participant Name

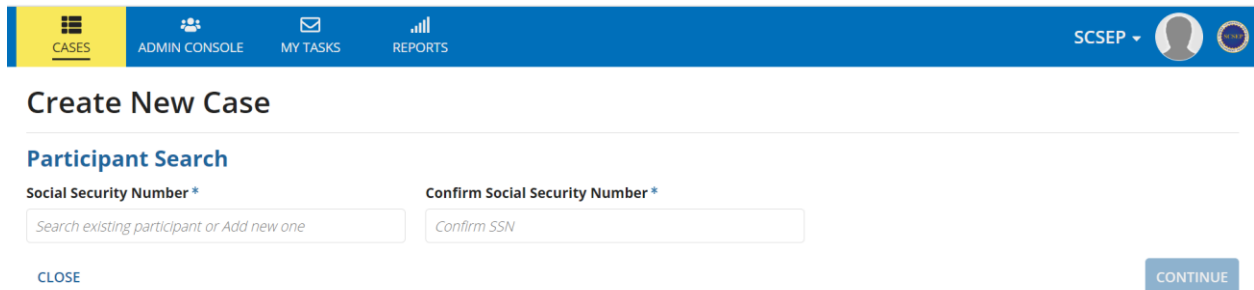
Participant Cases

Select an Action

Filters applied: Status; Enrollment Date

<input type="checkbox"/>	Case ID	Participant Name	Participant ID	Grantee	Sub-Grantee	Case Assigned To	County of Residence	Date of Enrollment	Exit Date	Months in Program	Status
<input type="checkbox"/>	10602520	Bonnie Moody	9967631	North Carolina	NC040 AARP	Lamar Jackson	Camden County	11/29/2021		27	Active
<input type="checkbox"/>	10581650	Johnny Howard	10000079	The WorkPlace	CT201 Fairfield County	Mary Smith	Fairfield County	4/14/2022		14	Active
<input type="checkbox"/>	10868346	8940 TA Request 2	10004909	California	CA025 City of Los Angeles Department of Aging	Frederick Kiesche III	Del Norte County	8/22/2022		12	Active
<input type="checkbox"/>	10869143	A. Howell	9812943	Operation A.B.L.E. of Greater Boston	MA Suffolk	Mary Smith	Walker County	12/30/2022		38	Active
<input type="checkbox"/>	10398542	Aaron Mehl	9986484	Ohio	OH104 - Elyria	Lamar Jackson	Cuyahoga County	7/12/2021		25	Active

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



Create New Case

Participant Search

Social Security Number * **Confirm Social Security Number ***

2. Type the applicant'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 applicant'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 applicant does not already exist in the system based on their SSN.

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

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

Create New Case

Participant Search

Social Security Number *

Confirm Social Security Number *

[Reset](#) | [Search](#)

[CLOSE](#)

[CONTINUE](#)

- 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 applicant'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 applicant'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 exist 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 applicant'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.

NOTE

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

Enter New Participant Details**First Name ***

Adrian

Middle Initial

A

Last Name *

Allweather

Date of Birth *

01/01/1950

[CLOSE](#)[CONTINUE](#)

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

Enter Case Details

Intake Eligibility Characteristics Other Enrollment Information

▼ Case Details**Grantee ***

--Select a Grantee--

Sub-Grantee *

--Select a Sub-Grantee--

Grant *

--- Select a Grant ---

Case Assigned To *

-- Select a Case Manager --

Application Date *

mm/dd/yyyy

▼ Participant Information**Social Security Number**

XXX-XX-XXXX

First Name *

Adrian

Middle Initial

A

Last Name *

Allweather

Date of Birth

01/01/1950

Adequate Connectivity☐ Yes☐ No**Adequate Device**☐ Yes☐ No**Primary Phone ***☐ Cell?**Alternate Phone**☐ Cell?**Email**

yourname@domain.com

Employment Status

--Select Employment Status--

▼ Mailing Address

Address Line 1 *

Address Line 2

City *

State *

Zip *

Zip+4

County of Residence *

▼ Residence State

State

▼ Secondary Contact Information

☐ Check if Available

▼ Participant Demographics

Gender

Ethnicity Hispanic / Latino?

☐ Yes

☐ No

☐ Participant did not self-identify

Did Participant Identify Race?

☐ Yes ☐ No

Race

☐ American Indian or Alaskan Native

☐ Native Hawaiian or Other Pacific Islander

☐ Asian

☐ Black / African American

☐ White

Select all that apply

CLOSE

SAVE + CONTINUE

SAVE + CLOSE

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.

Enter Case Details

Intake	Eligibility	Characteristics	Other Enrollment Information
--------	-------------	-----------------	------------------------------

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

▼ Case Details

Grantee * National Older Workers Association (NOWA)	Sub-Grantee * NOWA (New Jersey)
Grant * National Older Workers Association (NOWA) (Program Year: 2020 ,Grant #: AD37226...	Case Assigned To * Fred Smith - scsepmpm+nowacm@gmail.com - Case Manager
Application Date * 01/01/2020	

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 applicant's contact information into the fields.
If the applicant'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 applicant.
Refer to the Data Collection Handbook for guidance on the participant address and county.

▼ Participant Information

Social Security Number

XXX-XX-XXXX

First Name *

Adrian

Middle Initial

A

Last Name *

Allweather

Date of Birth

01/01/1950

Adequate Connectivity

☒ Yes

☐ No

Adequate Device

☒ Yes

☐ No

Primary Phone *

(222) 232-6022

☒ Cell?

Alternate Phone

☐ Cell?

Email

yourname@domain.com

Employment Status

Unemployed

▼ Mailing Address

Address Line 1 *

60 Broad Street

Address Line 2

Apartment 3a

City *

Somerset

State *

New Jersey

Zip *

08854

Zip+4

County of Residence *

Somerset County

▼ Residence State

State

New Jersey

8. If the applicant 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.

▼ Secondary Contact Information

☒ Check If Available

Contact Name

Relationship to Participant

Address Line 1

Primary Phone

Address Line 2

Alternate Phone

City

State

Zip

Email

9. Enter the applicant'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.

▼ Participant Demographics

Gender

Did Participant Identify Race?

☒ Yes ☐ No

Nationality

Ethnicity Hispanic / Latino?

☐ Yes
☒ No
☐ Participant did not self-identify

Race

☐ American Indian or Alaskan Native
☐ Native Hawaiian or Other Pacific Islander
☒ Asian
☐ Black / African American
☐ White
 Select all that apply

CLOSE

SAVE + CONTINUE

SAVE + CLOSE

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

Confirm Case Close

Are you sure that you want to close the case? All unsaved data will be lost.

NO

YES

- SAVE + CONTINUE** opens a pop-up window to confirm case creation.
 - 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.

Confirm Case Creation

Are you sure that you want to create this case? Warning: Please enter a phone number or email address so that the applicant can be contacted.

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

Confirm Case Creation

Do you want to save the case and close?

1.2 Eligibility

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

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 applicant 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.

Intake
Eligibility
Characteristics
Other Enrollment Information

Eligibility

Number in Family

 Enter the total members in family including the participant

Preliminary Eligibility Date

This preliminary eligibility determination will only become final when approved by a supervisor or above.

Total Includable Family Income
☐ 12 month
☐ 6 month

Is Family Income at or below 125% poverty level?
☐ Family Income is at or below 125% Poverty Level
☐ Family Income is not at or below 125% Poverty Level

Applicant Certification

Did the applicant sign the Applicant Certification?

☐ Yes
☐ No

PREVIOUS CLOSE

SAVE + CLOSE

Case Manager:

- Enter the information into the fields on the **Eligibility** screen.
- Click on one of the navigation buttons at the bottom of the screen:
 - PREVIOUS** – Button will navigate the user back to the prior page in the intake process.
 - 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.
 - SAVE + CONTINUE** – Button will save information entered on the page and navigate the user to the next page.
 - 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.

Participant Summary

Participant Name	Participant ID	State	Case ID
Adrian Allweather	CMS010005587	New Jersey	10869116
Grant Number	Age	County	Enrollment Date
AD37226216001	73	Somerset County	

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.

Participant Summary

Participant Name	Participant ID	State	Case ID
Adrian Allweather	CMS010005587	New Jersey	10869116
Grant Number	Age	County	Enrollment Date
AD37226216001	73	Somerset County	

System Eligibility Determination: Ineligible

Reasons for Ineligibility

- The participant's income is not at or below 125% Poverty Level.

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.

Participant Summary

Participant Name

Adrian Allweather

Participant ID

CMS010005587

State

New Jersey

Case ID

10869116

Grant Number

AD37226216001

Age

73

County

Somerset County

Enrollment Date

System Eligibility Determination: Ineligible

Reasons for Ineligibility

- The participant's income is not at or below 125% Poverty Level.

Eligibility Determination

SCSEP Eligible?

☐ Yes

☒ No

Reason for Ineligibility *

☐ Age

☐ Residence outside of state

☐ Employed

☐ Income

☐ Failed to file complete Application

☐ Other

Action Taken if Ineligible *

☐ Referred to One-Stop

☐ Referred to Social Services

☐ Referred to another project

☐ Placed in unsubsidized employment pursuant to MOU

☐ Other

Comment

0 / 2000

[PREVIOUS](#)

[SUBMIT ELIGIBILITY](#)

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.

SCSEP Eligible?

☒ Yes

☐ No

Comment

Submit Confirmation

The Supervisor will now review this request and make the final Eligibility decision. Do you want to continue?

NO

YES

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.

Eligibility Determination

SCSEP Eligible?

- ☐ Yes
☒ No

Reason for Ineligibility*

- ☐ Age
☐ Residence outside of state
☐ Employed
☐ Income
☐ Failed to file complete Application
☐ Other

Action Taken if Ineligible*

- ☐ Referred to One-Stop
☐ Referred to Social Services
☐ Referred to another project
☐ Placed in unsubsidized employment pursuant to MOU
☐ Other

Comment*

[PREVIOUS](#)
[SUBMIT ELIGIBILITY](#)

1.3 Characteristics

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

Enter Case Details

Intake Eligibility **Characteristics** Other Enrollment Information

▼ Participant Summary

Participant Name	Participant ID	State	Case ID
Adrian Allweather	CM5010005587	New Jersey	10869116
Grant Number	Age	County	Enrollment Date
AD37226216001	73	Somerset County	

▼ Priority of Service

⚠ 'Formerly Incarcerated?' is blank

Veteran Status * <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Status not known	Eligible Veteran Status * <input type="radio"/> Served less than 180 days <input type="radio"/> Eligible veteran <input type="radio"/> Spouse of Veteran <input type="radio"/> Not eligible (Show Detailed Instructions)	Veteran, Post-9/11 Era <input type="radio"/> Yes <input checked="" type="radio"/> No
Individual with a Disability * <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Participant did not self-identify (Show Detailed Instructions)	Disability Reported As <input type="radio"/> Self Reported <input type="radio"/> Is Documented	Received services funded by the State Development Disabilities Agency (SDDA) <input type="radio"/> Yes <input type="radio"/> No
Homeless * <input type="radio"/> Yes <input type="radio"/> No (Show Detailed Instructions)	At Risk of Homelessness * <input type="radio"/> Yes <input type="radio"/> No	Urban or Rural * <input type="radio"/> Urban <input type="radio"/> Rural (Lookup RUCA by Zip Code) / (Lookup RUCA by State/County/Tract Code)
Homeless * <input type="radio"/> Yes <input type="radio"/> No (Show Detailed Instructions)	At Risk of Homelessness * <input type="radio"/> Yes <input type="radio"/> No	Urban or Rural * <input type="radio"/> Urban <input type="radio"/> Rural (Lookup RUCA by Zip Code) / (Lookup RUCA by State/County/Tract Code)
Failed to Find Employment After Using WIOA Title I * <input type="radio"/> Yes <input type="radio"/> No	Low Literacy Skills * <input type="radio"/> Yes <input type="radio"/> No	Low Employment Prospects * <input type="radio"/> Yes <input type="radio"/> No
Limited English Proficiency * <input type="radio"/> Yes <input type="radio"/> No		Formerly Incarcerated? * <input type="radio"/> Yes <input type="radio"/> No

▼ Most In Need Waiver Factors

Severe Disability * <input type="radio"/> Yes <input type="radio"/> No Date Severe Disability Last Updated <input type="text" value="mm/dd/yyyy"/>	Frail * <input type="radio"/> Yes <input type="radio"/> No Date Frail Last Updated <input type="text" value="mm/dd/yyyy"/>	75 or Older * <input type="radio"/> Yes <input checked="" type="radio"/> No Low Literacy Skills * <input type="radio"/> Yes <input type="radio"/> No Date Low Literacy Skills Last Updated <input type="text" value="mm/dd/yyyy"/>	Formerly Incarcerated? <input type="radio"/> Yes <input type="radio"/> No Date Formerly Incarcerated Last Updated <input type="text" value="mm/dd/yyyy"/>
Severely Limited Employment Prospects * <input type="radio"/> Yes <input type="radio"/> No Date Severely Limited Employment Prospects Last Updated <input type="text" value="mm/dd/yyyy"/>	Old Enough but Not Receiving SS Title II * <input type="radio"/> Yes <input type="radio"/> No Date Old Enough but Not Receiving SS Title II Last Updated <input type="text" value="mm/dd/yyyy"/>		
Limited English Proficiency * <input type="radio"/> Yes <input type="radio"/> No Date Limited English Proficiency Last Updated <input type="text" value="mm/dd/yyyy"/>			

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.

<p>Individual with a Disability *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><input checked="" type="radio"/> Participant did not self-identify</p>	<p>Disability Reported As</p> <p><input type="radio"/> Self Reported</p> <p><input type="radio"/> Is Documented</p>	<p>Received services funded by the State Development Disabilities Agency (SDDA)</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>
---	--	---

Homeless

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

Homeless *

☒ Yes

☐ No

[\(Show Detailed Instructions\)](#)

At Risk of Homelessness *

☐ Yes

☒ No

Limited English Proficiency

When a user selects **Yes** for **Limited English Proficiency**, the field **Primary Language** appears and is mandatory. Please note that users cannot select **Yes** for both **Limited English Proficiency** and **Low Literacy Skills** Characteristics.

<p>~ Most In Need Waiver Factors</p> <p>Severe Disability *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Severe Disability Last Updated</p> <p>mm/dd/yyyy</p> <p>Severely Limited Employment Prospects *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Severely Limited Employment Prospects Last Updated</p> <p>mm/dd/yyyy</p> <p>Limited English Proficiency *</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Limited English Proficiency Last Updated</p> <p>mm/dd/yyyy</p>	<p>Frail *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Frail Last Updated</p> <p>mm/dd/yyyy</p> <p>Old Enough but Not Receiving SS Title II *</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Old Enough but Not Receiving SS Title II Last Updated</p> <p>mm/dd/yyyy</p>	<p>75 or Older *</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Low Literacy Skills *</p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Low Literacy Skills Last Updated</p> <p>mm/dd/yyyy</p>	<p>Formerly Incarcerated?</p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p>Date Formerly Incarcerated Last Updated</p> <p>mm/dd/yyyy</p>
--	---	--	--

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

i 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

Individual with a Disability *

- ☐ Yes
- ☐ No
- ☐ Participant did not self-identify

(Show Detailed Instructions)

Homeless *

- ☐ Yes
- ☐ No

(Show Detailed Instructions)

Eligible Veteran Status *

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

(Show Detailed Instructions)

Disability Reported As

- ☐ Self Reported
- ☐ Is Documented

At Risk of Homelessness *

- ☐ Yes
- ☐ No

Veteran, Post-9/11 Era

- ☐ Yes
- ☒ No

Received services funded by the State Development Disabilities Agency (SDDA)

- ☐ 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 *

Severely Limited Employment Prospects *

- ☐ Yes
☐ No

Date Severely Limited Employment Prospects Last Updated *

Limited English Proficiency *

- ☐ Yes
☐ No

Date Limited English Proficiency Last Updated *

Frail *

- ☐ Yes
☐ No

Date Frail Last Updated *

Old Enough but Not Receiving SS Title II *

- ☐ Yes
☐ No

Date Old Enough but Not Receiving SS Title II Last Updated *

75 or Older *

- ☒ Yes
☐ No

Low Literacy Skills *

- ☐ Yes
☐ No

Date Low Literacy Skills Last Updated *

Formerly Incarcerated?

- ☐ Yes
☐ No

Date Formerly Incarcerated Last Updated *

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 *

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

Participant Characteristics Comments

0 / 2000

PREVIOUS CLOSE

SAVE + CONTINUE

SAVE + CLOSE

1.4 Other Enrollment Information

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

Enter Case Details

Intake Eligibility Characteristics **Other Enrollment Information**

Participant Summary

Participant Name Adrian Allweather	Participant ID CMS010005587	State New Jersey	Case ID 10869116
Grant Number AD37226216001	Age 73	County Somerset County	Enrollment Date

Co-Enrollment in Other Program Services (Select as many as apply)

☐ None

Co-Enrollment in WIOA Adult Formula program?

- ☐ Yes, Local Formula
☐ Yes, Statewide
☐ Yes, Both Local Formula and Statewide
☐ No

Co-Enrollment in Title II Adult Education (WIOA)?

- ☐ Yes
☐ No
☐ Unknown

Co-Enrollment in National Farmworker Jobs Program?

- ☐ Yes
☐ No

Co-Enrollment in Indian and Native American Programs?

- ☐ Yes

☐ No

Co-Enrollment in Veterans' Programs?

- ☐ Yes, DVOP Specialist
☐ Yes, LVER Specialist
☐ No
☐ Unknown

Co-Enrollment in Vocational Education program?

- ☐ Yes
☐ No
☐ Unknown

Co-Enrollment in WIOA Vocational Rehabilitation program?

- ☐ Yes
☐ VR1
☐ Both VR and VR1
☐ No
☐ Unknown

Co-Enrollment in Wagner-Peyser Employment Service program?

- ☐ Yes
☐ Reportable Individual
☐ No
☐ Unknown

Receiving Employment and Training Services Related to SNAP?

- ☐ Yes
☐ No

Co-Enrollment in Other WIOA or Non-WIOA Programs?

- ☐ Yes, Other WIOA or Non-WIOA Programs
☐ I/DD, MH or other disability programs
☐ No

If Other, please Specify

Participant Interest Job Code

Job Codes

--Select at most 3 Job Codes--

Comments

0 / 2000

Program Introduction

Pre-Assessment Date

mm/dd/yyyy

Program Overview Date

mm/dd/yyyy

PREVIOUS

CLOSE

COMPLETE

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

Participant Summary

Participant Name

Adrian Allweather

Participant ID

CMS010005587

State

New Jersey

Case ID

10869116

Grant Number

AD37226216001

Age

73

County

Somerset County

Enrollment Date

Co-Enrollment in Other Program Services (Select as many as apply)

☒ None

Co-Enrollment in WIOA Adult Formula program?

- ☐ Yes, Local Formula
☐ Yes, Statewide
☐ Yes, Both Local Formula and Statewide
☒ No

Co-Enrollment in Title II Adult Education (WIOA)?

- ☐ Yes
☒ No
☐ Unknown

Co-Enrollment in Vocational Education program?

- ☐ Yes
☒ No
☐ Unknown

Co-Enrollment in WIOA Vocational Rehabilitation program?

- ☐ Yes
☐ VR1
☐ Both VR and VR1
☒ No
☐ Unknown

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.

Participant Interest Job Code

Job Codes

--Select at most 3 Job Codes--

Comments

0 / 2000

Program Introduction

Pre-Assessment Date

mm/dd/yyyy



Program Overview Date

mm/dd/yyyy



PREVIOUS

CLOSE

COMPLETE

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.

Adrian Allweather (Case ID: 10869116)

Summary

Assignments

Participant Required Actions

Participant History

Extensions

Related Actions

Summary | [Intake](#) | [Eligibility](#) | [Recertification](#) | [Characteristics](#) | [Other Enrollment Information](#)

Pending

Pending Eligibility
Approval

Eligible

Active

Pending
Recertification

Exited - In Follow-Up

Exited - Closed

Locked

Participant Summary

Participant Name

Adrian Allweather

Participant ID

CMS010005587

Month(s) in Program

0 months, 0 days

Primary Phone

(222) 232-6022

Age

73

Durational Limit Date

Day(s) Left in Program

0

Intake Checklist

Action Items	
Eligibility	<input checked="" type="checkbox"/>
Characteristics	<input checked="" type="checkbox"/>
Other Enrollment	<input checked="" type="checkbox"/>
Program Introduction	<input checked="" type="checkbox"/>

2. Add Assignment

Upon approval of Eligibility of the applicant by the Supervisor, the status changes to Eligible. Now the Assignments can be added to the Participant. Assignments can be added or edited, even after a participant has exited the program.

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**.

Adrian Allweather (Case ID: 10869116)

[ADD ASSIGNMENT](#)
[ADD TO WAITLIST](#)

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

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

Participant Summary

Participant Name Adrian Allweather	Participant ID CMS010005587	State New Jersey	Case ID 10869116
Grant Number AD37226216001	Age 73	County Somerset County	Enrollment Date

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
No Assignments available			

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).

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

Add Assignment

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

Participant Summary

Assignment Checklist

Action Items	
Intake	<input checked="" type="checkbox"/>
Eligibility	<input checked="" type="checkbox"/>
Characteristics	<input type="checkbox"/>
Other Enrollment Information	<input checked="" type="checkbox"/>

[CANCEL](#)

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.


Adrian Allweather (Case ID: 10869116)

[Summary](#) [Assignments](#) [Participant Required Actions](#) [Participant History](#) [Extensions](#) [Related Actions](#)

[Summary](#) | [Intake](#) | [Eligibility](#) | [Recertification](#) | [Characteristics](#) | [Other Enrollment Information](#)

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

Participant Summary

Participant Name Adrian Allweather	Participant ID CMS010005587	Month(s) in Program 0 months, 0 days
Primary Phone (222) 232-6022 	Age 73	Day(s) Left in Program 0
Durational Limit Date		

Intake Checklist

Action Items	
Eligibility	<input checked="" type="checkbox"/>
Characteristics	<input checked="" type="checkbox"/>
Other Enrollment	<input checked="" type="checkbox"/>
Program Introduction	<input checked="" type="checkbox"/>

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

Belinda Chesterfield (Case ID: 10869117)

[ADD ASSIGNMENT](#)
[ADD TO WAITLIST](#)

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

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

Participant Summary

Participant Name Belinda Chesterfield	Participant ID CMS010005588	State New Jersey	Case ID 10869117
Grant Number AD3726216001	Age 73	County Middlesex County	Enrollment Date

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
No Assignments available			

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

Assignment Details

Assignment Date *

07/03/2023

Assignment Start Date

mm/dd/yyyy

Assignment End Date

mm/dd/yyyy

Job Code

Please select a Job Code

Workers' Comp Code

Host Agency

State

Illinois

City

Chicago

Organization Name

E

SEARCH

Agency ID	Name	FEIN	Address	Primary Contact
9954068	Chicago Anti Hunger Fed		4345 West Division, Chicago, Illinois 60681	Ms. Barb Uteg
9954321	Sankofa Safe Child Initiative	364535455	1500 South Keeler Ave., Chicago, Illinois 60623	Ms.Ms. Annetta WilsonRosie Hicks-Patton

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.

9954604	Ada Niles Satellite Center	60621	653 West 63rd Street, Chicago, Illinois 60621	Ms.Ms. Denise KingDenise King
9954788	Robert Healy School	3010 South Parnell Avenue, Chicago, Illinois 60616		

<< < 1 - 10 of 1,548 > >>

ADD NEW HOST AGENCY

SELECT ORGANIZATION

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

Assignment Details

Assignment Date *
 07/03/2023

Assignment Start Date
 mm/dd/yyyy

Assignment End Date
 mm/dd/yyyy

Job Code
 Please select a Job Code

Workers' Comp Code
 [Empty Field]

Host Agency *
 Robert Healy School ✕

Site Name and Location
 [Empty Field]

Survey Contact *
 Please select a survey contact

[+] New Survey Contact

Supervisor
 Please select a Supervisor

Select only if Supervisor is different than Contact

Supervisor Funding Source Type
☐ Federal
☐ Non-federal

Assigned To *
☐ Grantee or sub-recipient/ local project
☐ Workforce Partner
☐ Other host agency

CSA Code Type *
☒ General
☐ Elderly

CSA Code *
 Please select a value

CSA Title
 [Empty Field]

Comments

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

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

Add Organization

Organization Details

Organization Name
 Franklin Internet Cafe

FEIN
 [Empty Field]

Address Line 1 *
 [Empty Field]

Address Line 2
 [Empty Field]

Organization Type *
☐ Government
☐ Profit
☐ Not For Profit

Additional Details

Agency Type
 Host Agency

Organization Continued Availability
☐ Available
☒ Not Available ✕

Add New

Host Agency Agreement Date
 mm/dd/yyyy

Host Agency Monitoring Visit Date
 mm/dd/yyyy

City * State * Zip * Zip+4

City --- Select a State --- 5 Digit Zip Code

▼ Contact Address

☐ Check If Contact Address is different than the Organization Address

▼ Contact Information

Salutation
Please Select Value

Contact First Name * Contact Last Name *

Title Is Primary POC?
☒ Yes ☐ No

Primary Contact Number ☐ Cell? Primary Extension

Alternate Contact Number ☐ Cell? Alternate Extension

Fax Number E-mail

CANCEL ADD

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

CASES ADMIN CONSOLE MY TASKS REPORTS SCSEP

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

Participant Summary

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

Assignment Details

Assignment Date *
01/01/2020

Assignment Start Date
mm/dd/yyyy

Host Agency *
Franklin Park Internet Cafe

Site Name and Location
Franklin Park Research Park

Assigned To *
☐ Grantee or sub-recipient/ local project
☐ Workforce Partner

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

Assignment Date * <input type="text" value="01/01/2020"/>	Host Agency * <input type="text" value="Franklin Park Internet Cafe"/>	Assigned To * <input checked="" type="radio"/> Grantee or sub-recipient/ local project <input type="radio"/> Workforce Partner <input type="radio"/> Other host agency CSA Code Type * <input type="radio"/> General <input checked="" type="radio"/> Elderly CSA Code * <input type="text" value="E1. Project Administration"/> CSA Title <input type="text"/>
Assignment Start Date <input type="text" value="mm/dd/yyyy"/>	Site Name and Location <input type="text" value="Franklin Park Research Park"/>	
Assignment End Date <input type="text" value="mm/dd/yyyy"/>	Survey Contact ? * <input type="text" value="Haring, Rachel"/>	
Job Code <input type="text" value="Please select a Job Code"/>	[+] New Survey Contact Supervisor <input type="text" value="Please select a Supervisor"/>	
Workers' Comp Code <input type="text"/>	Select only if Supervisor is different than Contact Supervisor Funding Source Type <input type="radio"/> Federal <input type="radio"/> Non-federal <input type="radio"/> Other	Starting Wage per Hour * <input type="text" value="\$15.00"/>
Participant's Schedule <input type="text"/>		Hours per week * <input type="text" value="40"/>
0 / 2000		Comments ? <input type="text"/>
0 / 2000		0 / 2000

CANCEL
SAVE

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

Summary
Assignments
Participant Required Actions
Participant History
Extensions
Related Actions

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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

[Assignment Details](#) | [Approved Breaks](#) | [Training and Services](#) | [Paid Hours](#)

Assignment Details

[Edit](#)

Assignment Date	01/01/2020	Host Agency	Franklin Park Internet Cafe	Assigned To	Grantee or sub-recipient/ local project
Assignment Start Date	01/01/2020	Site Name and Location	Franklin Park Research Park	CSA Code	E1. Project Administration
Assignment End Date		Survey Contact	Haring, Rachel	CSA Title	
Job Code	Computer and Mathematical Occupations	Supervisor		Starting Wage per Hour	\$15.00
Workers' Comp Code		Supervisor Funding Source Type	Federal	Hours per week	40
		Participant's Schedule		Comments	

3. Add Service


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

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

SCSEP 

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

Add New Service

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

General Details

Assignment*

Assignment Date - 01/01/2020

Category*

Pick a category

Type*

Pick a category

Service Details

Start Date*

mm/dd/yyyy

Expected End Date*

mm/dd/yyyy

Actual End Date

mm/dd/yyyy

Is this a One Day Service?*

☐ Yes ☐ No

Comments

0 / 2000

Additional Fields

Service Provider

State Select a State	City <input type="text"/>	Organization Name <input type="text"/>
<input type="button" value="SEARCH"/>		

CANCEL

SAVE + ADD ANOTHER

SAVE + CLOSE

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

- Category
- Type

General Details

Assignment*

Assignment Date - 01/01/2020

Category*

Education and Training

Type*

Apprenticeship Training

Service Details

Start Date*

02/01/2020

Expected End Date

02/15/2020

Actual End Date

mm/dd/yyyy

Is this a One Day Service? *

☐ Yes ☒ No

Comments

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

- State
- City
- 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.

Additional Fields

Service Provider

State

Select a State

City

Organization Name

SEARCH

Supportive Service Provided By*

- ☐ Grantee or sub-recipient/local project
☐ Workforce partner
☐ Other
☐ Both i and ii
☐ Both i and iii

[CANCEL](#)
[SAVE + ADD ANOTHER](#)
[SAVE + CLOSE](#)

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.

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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

Assignment Details | [Approved Breaks](#) | **[Training and Services](#)** | [Paid Hours](#)

Assignment Details

[Edit](#)

Assignment Date	01/01/2020	Host Agency	Franklin Park Internet Cafe
Assignment Start Date	01/01/2020	Site Name and Location	Franklin Park Research Park
Assignment End Date		Survey Contact	Haring, Rachel
Job Code	Computer and Mathematical Occupations	Supervisor	
Workers' Comp Code		Supervisor Funding Source Type	Federal
		Participant's Schedule	
		Assigned To	Grantee or sub-recipient/ local project
		CSA Code	E1. Project Administration
		CSA Title	
		Starting Wage per Hour	\$15.00
		Hours per week	40
		Comments	

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

Participant Summary


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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

[Assignment Details](#) | [Approved Breaks](#) | [Training and Services](#) | [Paid Hours](#)

Training and Services

Category	Type	Service Provider	Start Date	Expected End Date	
Education and Training	Apprenticeship Training	Incomparable Cabling	02/01/2020	02/15/2020	


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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

[Assignment Details](#) | [Approved Breaks](#) | [Training and Services](#) | [Paid Hours](#)

Assignment Details

Assignment Date 01/01/2020	Host Agency Franklin Park Internet Cafe	 Edit
Assignment Start Date 01/01/2020	Site Name and Location Franklin Park Research Park	
Assignment End Date	Survey Contact Haring, Rachel	
Job Code Computer and Mathematical Occupations	Supervisor	
Workers' Comp Code	Supervisor Funding Source Type Federal	
	Participant's Schedule	
	Assigned To Grantee or sub-recipient/ local project	
	CSA Code E1. Project Administration	
	CSA Title	
	Starting Wage per Hour \$15.00	
	Hours per week 40	
	Comments	

4. Breaks

4.1 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.

Belinda Chesterfield (Case ID: 10869117)

[ADD ASSIGNMENT](#)
[ADD SERVICE](#)
[ADD BREAK](#)
[...](#)

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

[Pending](#)
[Pending Eligibility Approval](#)
[Eligible](#)
[Active](#)
[Pending Recertification](#)
[Exited - In Follow-Up](#)
[Exited - Closed](#)
[Locked](#)

Participant Summary

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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

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

Belinda Chesterfield (Case ID: 10869117)

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

Add Approved Break

Participant Summary

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

Break in Service Details

Assignment *

01/01/2020 -

Approved Break Start Date *

mm/dd/yyyy

Expected End Date

mm/dd/yyyy

Actual End Date

mm/dd/yyyy

Is Documentation Provided?

☐ Yes

☐ No

Reason for Approved Break in Participation? *

- ☐ Family/Health
- ☐ Personal
- ☐ Administrative
- ☐ Right of Return
- ☐ Other

Comments

0 / 2000

[CANCEL](#)

[SAVE](#)

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

Pending	Pending Eligibility Approval	Eligible	Active - On Break	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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

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.

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

Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

[Assignment Details](#) |
 [Approved Breaks](#) |
 [Training and Services](#) |
 [Paid Hours](#)

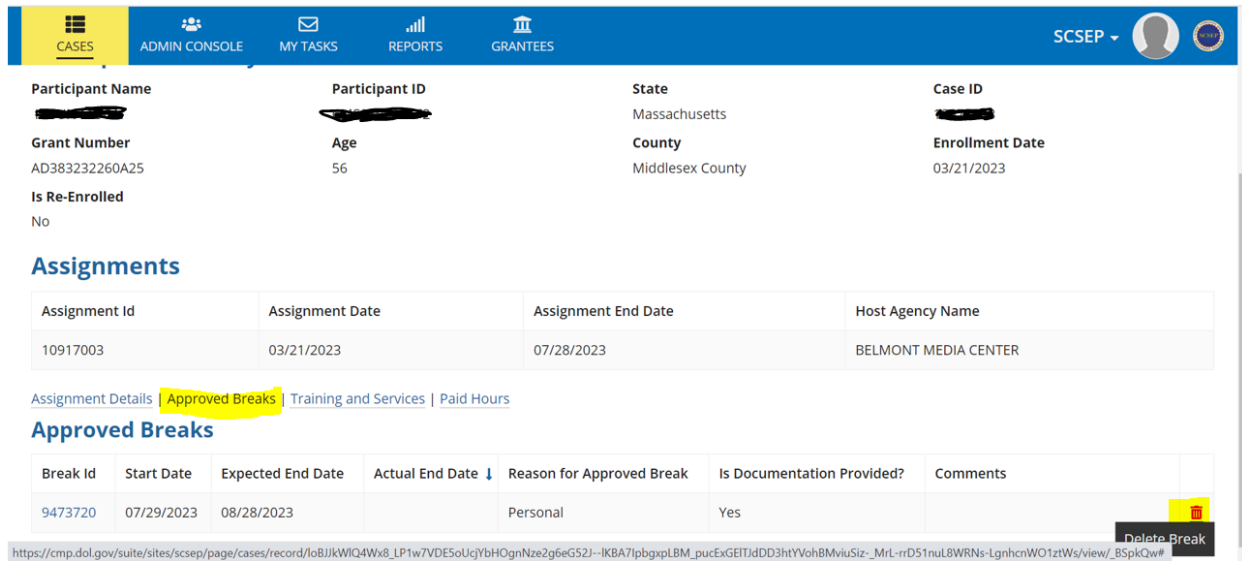
Approved Breaks

Break Id	Start Date	Expected End Date	Actual End Date ↓	Reason for Approved Break	Is Documentation Provided?	Comments
9687760	03/01/2020	04/01/2020		Family/health	Yes	

4.2 Delete Break

Users can delete **Approved Breaks** without contacting SCSEP Help.

- Click **Assignments**
- Click **Approved Breaks**.
- Click the **Delete Break** icon.



The screenshot shows the SCSEP system interface. At the top, there's a navigation bar with tabs: CASES, ADMIN CONSOLE, MY TASKS, REPORTS, and GRANTEES. The 'CASES' tab is active. Below the navigation bar, there's a participant summary section with fields: Participant Name, Participant ID, State (Massachusetts), Case ID, Grant Number (AD383232260A25), Age (56), County (Middlesex County), Enrollment Date (03/21/2023), and Is Re-Enrolled (No). Below this, there's an 'Assignments' section with a table showing one assignment: Assignment Id 10917003, Assignment Date 03/21/2023, Assignment End Date 07/28/2023, and Host Agency Name BELMONT MEDIA CENTER. Below the assignments table, there's a tabbed interface with 'Approved Breaks' selected. The 'Approved Breaks' table shows one break: Break Id 9473720, Start Date 07/29/2023, Expected End Date 08/28/2023, Actual End Date (empty), Reason for Approved Break Personal, Is Documentation Provided? Yes, and Comments (empty). A 'Delete Break' button with a trash icon is visible next to the break entry.

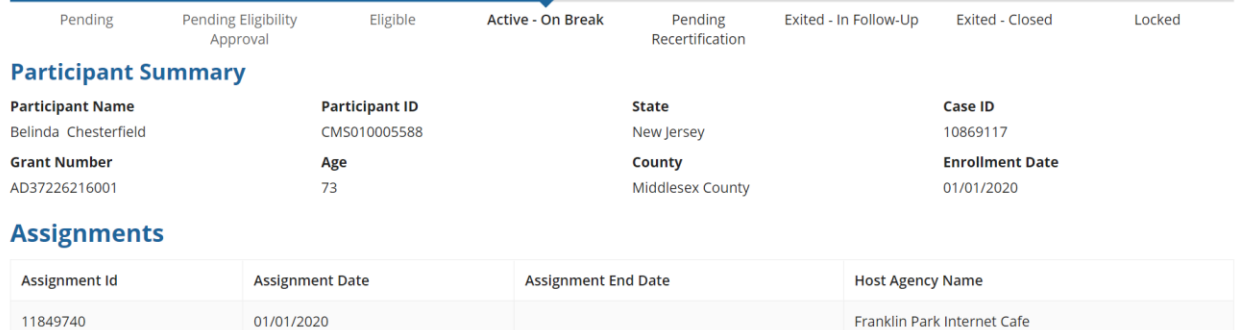
5. Manage Paid Hours

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

Belinda Chesterfield (Case ID: 10869117)

ADD SERVICE ADD BREAK **MANAGE PAID HOURS**

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



The screenshot shows the 'Manage Paid Hours' page for Belinda Chesterfield (Case ID: 10869117). The page has a navigation bar with tabs: Summary, Assignments, Participant Required Actions, Participant History, Extensions, and Related Actions. The 'Assignments' tab is active. Below the navigation bar, there's a status bar with tabs: Pending, Pending Eligibility Approval, Eligible, Active - On Break, Pending Recertification, Exited - In Follow-Up, Exited - Closed, and Locked. The 'Active - On Break' tab is active. Below the status bar, there's a 'Participant Summary' section with fields: Participant Name (Belinda Chesterfield), Participant ID (CMS010005588), State (New Jersey), Case ID (10869117), Grant Number (AD37226216001), Age (73), County (Middlesex County), and Enrollment Date (01/01/2020). Below the summary, there's an 'Assignments' section with a table showing one assignment: Assignment Id 11849740, Assignment Date 01/01/2020, Assignment End Date (empty), and Host Agency Name Franklin Park Internet Cafe.

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. Please note that users can also add Paid Hours for the previous program year. Users can access previous program years by selecting the appropriate year within the **Program Year** drop-down.

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

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

CASES
 ADMIN CONSOLE MY TASKS REPORTS GRANTEES DATA VALIDATION

SCSEP

Harvey Conkin
Grant Number
 AD383252260A24
 Is Re-Enrolled
 No

CM5010004928
Age
 80

Tennessee
County
 Sullivan County

10869143
Enrollment Date
 12/01/2022

Total Hours Paid in Quarter
Program Year 2023

Host Agency Name	Assignment Start Date	Assignment End Date	Program Year	Total Hours	Q1	Q2	Q3	Q4
Hope Haven Ministries Inc.	12/01/2022		2023	PRA Activities				
				Paid Training (In Person)				
				Paid Training (Remote)				
				Paid CSA (In Person)	186			
				Paid CSA (Remote)				
				Paid Sick Leave				
				Total Hours	186	0	0	0

CLOSE

SUBMIT

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.

Summary

Assignments

Participant Required Actions

Participant History

Extensions

Related Actions

Pending

Pending Eligibility Approval

Eligible

Active

Pending Recertification

Exited - In Follow-Up

Exited - Closed

Locked

Participant Summary

Participant Name Belinda Chesterfield	Participant ID CM5010005588	State New Jersey	Case ID 10869117
Grant Number AD37226216001	Age 73	County Middlesex County	Enrollment Date 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 *
No Orientation data available	
Add New	

6.1 Orientation Details

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

Participant Name Belinda Chesterfield	Participant ID CMS010005588	State New Jersey	Case ID 10869117
Grant Number AD37226216001	Age 73	County Middlesex County	Enrollment Date 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 *
No Orientation data available	
Add New	

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 Belinda Chesterfield	Participant ID CMS010005588	State New Jersey	Case ID 10869117
Grant Number AD37226216001	Age 73	County Middlesex County	Enrollment Date 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

Participant Summary




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

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

Physical Exam Details

Instructions

You must offer each participant a free physical examination annually, starting at the beginning of the enrollment. You must enter a new row with a new date each year. Hover over the fields below for definitions and more details.

Date of Offer of Physical Exam * 	Declined Offer of Physical Exam * 	Provided By * 	
No Offer Of Physical Exam data available			
Add New			







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.

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

Physical Exam Details

Instructions

You must offer each participant a free physical examination annually, starting at the beginning of the enrollment. You must enter a new row with a new date each year. Hover over the fields below for definitions and more details.

Date of Offer of Physical Exam * 	Declined Offer of Physical Exam * 	Provided By * 	
01/01/2020 	<input type="radio"/> Yes <input checked="" type="radio"/> No	Samson Medical	 

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**.

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

Safety Consultation Details

Instructions

You must provide an annual safety consultation to each participant at their host agency assignment, starting at the beginning of the first assignment. You must enter a new row with a new date each year or sooner if the participant starts a new assignment.

Participant Safety Consultation Date *	Provided By *
No Safety Consultation data available	
+ Add New	

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.

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

Safety Consultation Details

Instructions

You must provide an annual safety consultation to each participant at their host agency assignment, starting at the beginning of the first assignment. You must enter a new row with a new date each year or sooner if the participant starts a new assignment.

Participant Safety Consultation Date *	Provided By *
01/01/2020	Samantha Powers
Save Bin	

6.4 Assessment Details

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

[Orientation](#) | [Offer Of Physical Exam](#) | [Participant Safety Consultation](#) | [Assessment and Re-assessment/IEP](#)

Assessment/IEP Details

Instructions

You must conduct an assessment of each participant at least twice in a 12-month period, starting at the beginning of the enrollment. Each assessment or re-assessment must be followed by an update of the participant's IEP. As part of the assessment, you must also indicate: if the participant needs any supportive services; the date on which you last provided transition planning if required; and whether the participant has adequate internet connectivity and a device for remote assignments and training. You must enter a new row with a new date each time you do a reassessment. Hover over the fields below for definitions and more details.

Assessment (Re-assessment) Date *	Supportive Services Needed? *	Transition Planning	IEP Date	Provided By *
No Assessment (and Re-assessment) of Skill level and Other Service Needs data available				
+ Add New				

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.

Assessment/IEP Details

Instructions
You must conduct an assessment of each participant at least twice in a 12-month period, starting at the beginning of the enrollment. Each assessment or re-assessment must be followed by an update of the participant's IEP. As part of the assessment, you must also indicate: if the participant needs any supportive services; the date on which you last provided transition planning if required; and whether the participant has adequate internet connectivity and a device for remote assignments and training. You must enter a new row with a new date each time you do a reassessment. Hover over the fields below for definitions and more details.

Assessment (Re-assessment) Date * ⓘ	Supportive Services Needed? * ⓘ	Transition Planning ⓘ	IEP Date ⓘ	Provided By * ⓘ	
02/01/2020	<input type="radio"/> Yes <input checked="" type="radio"/> No	02/01/2020	02/01/2020	Samantha Powers	

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**

Charles Dexter-Ward (Case ID: 10869111)

Summary Assignments Participant Required Actions Placements/Follow-ups **Participant History** Extensions Related Actions

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

Participant Summary

Participant Name	Participant ID	State	Case ID
Charles Dexter-Ward	CMS010005582	New Jersey	10869111
Grant Number	Age	County	Enrollment Date
AD37226216001	73	Middlesex County	01/01/2020
			Date of Program Exit
			12/31/2021

Participant History

Case ID	Grantee	Sub-Grantee	Application Date	Status	Exit Date
10869111	National Older Workers Association (NOWA)	NOWA (New Jersey)	01/01/2020	Exited - In Follow-Up	12/31/2021

Assignment History

Assignment ID	Assignment Date	Assignment End Date	Host Agency	Host Agency ID
11849743	01/01/2020	12/31/2021	SQL Coders Like Us	10274103

Break History

Break ID	Start Date	Expected End Date	Actual End Date
9687763	02/01/2020	02/15/2020	02/15/2020

Placement History

Employer Name	Employer ID	Start Date	End Date	Placement ID
Senior SQL Coders	10274122	01/01/2023		13329700

Training History

Training Provider	Training ID	Start Date	End Date
Computer Training (e.g., Computer Literacy Training)	205	01/01/2020	01/15/2020

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			

Waiver Factors for Program Year 2023

Severe Disability *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

Frail *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

Old Enough but Not Receiving SS Title II *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

Severely Limited Employment Prospects *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

Limited English Proficiency *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

Because 'Low Literacy Skills' is Yes 'Limited English Proficiency' must be No

Low Literacy Status *

- ☒ Yes
☐ No

Last Updated Date *

08/07/2023

Formerly Incarcerated *

- ☐ Yes
☒ No

Last Updated Date *

08/07/2023

75 or Older

- ☐ Yes
☒ No

8.2 Manage Extensions

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

Add Extension is Unavailable

- Extension 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 three months prior to the start of that Program Year.

Program Year *

2022

Extensions	Program Year	Waiver Updated On
No Extensions available		

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

Add Extension is Unavailable

- Extension 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 three months prior to the start of that Program Year.

Program Year *

2022

Extensions	Program Year	Waiver Updated On
No Extensions available		

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:

Termination Letter date: A date field that can be entered and edited independently of other exit data and edited if needed. This field is not required. If a user enters a Termination Letter Date and no other Exit data, then the user will receive a notification 25 days after the Termination Letter date is submitted.

Exit Information

Termination Letter date 
<input type="text" value="mm/dd/yyyy"/>

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

Exit Information

Exit Comments

☐ Deceased after exit?

90-Day Date

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. Note that the user will not be able to select **Durational limit** as the **Other Reason for Exit** if the participant's Durational Limit Date is in the future.

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.

Participant Summary

Participant Name

Belinda Chesterfield

Participant ID

CMS010005588

State

New Jersey

Case ID

10869117

Grant Number

AD37226216001

Age

73

County

Middlesex County

Enrollment Date

01/01/2020

Exit Information

Category of Exit *

Unsubsidized Employment

Exit Date *

03/01/2022

Unsubsidized Employment Type *

- ☐ Regular Employment
- ☐ Self-Employment

Exit Comments

90-Day Date 5/30/2022

☐ 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 ADD PLACEMENT](#)

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

CASES
 ADMIN CONSOLE
 MY TASKS
 REPORTS
 GRANTEES

SCSEP

Jane Knudser (Case ID: 10646328)

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Placements/Follow-ups](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

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

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

Participant Summary

Participant Name Jane Knudser Primary Phone (641) 228-1997 Durational Limit Date 08/14/2027 Recertification Date 07/06/2006	Participant ID CM5009586463 Age 86 Day(s) Left in Program 1461	Month(s) in Program 0 months, 0 days
--	--	--

Exit Summary

Type of Exit
Manual Exit

CASES
 ADMIN CONSOLE
 MY TASKS
 REPORTS
 GRANTEES

SCSEP

Jane Knudser (Case ID: 10646328)

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Placements/Follow-ups](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

Add Service
 Add Placement
 Add Break
 Manage Waiver Factors
Modify Exit
 Manage Paid Hours
 Move Case

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.


CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP 

AD362682160A51

84


Towns County

06/12/2014

Is Re-Enrolled

No

Exit Information

Termination Letter date 

Category of Exit

Other Reason for Exit

Exit Date

03/15/2018

Other Reason for Exit

Exit Comments

90-Day Date

6/13/2018

Deceased after exit?

No

Created By

SPARQ

Created On

09/06/2022

CLOSE

DELETE

EDIT

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


CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP 

90-Day Date

6/13/2018

☐ 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

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.

CASES
ADMIN CONSOLE
MY TABS
REPORTS
GARAGES

SCSEP

Georgina Jones (Case ID: 10869109)

Summary
Assignments
Participant Required Actions
Placements/Follow-ups
Participant History
Extensions
Related Actions

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

Participant Summary

Participant Name Georgina Jones	Participant ID CM5019005580	State New Jersey	Case ID 10869109
Grant Number A03726216061	Age 73	County Middlesex County	Enrollment Date 01/01/2020
Is Re-Enrolled No			Date of Program Exit 02/01/2022

Placements

Placement ID	Employer	Placement Start Date	Job Title	Placement End Date	Wage per Hour
13331776	Capital Realty Services	02/01/2022	Clerk	03/01/2022	

Training and Services

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.

Start Date *

mm/dd/yyyy

End Date

mm/dd/yyyy

Site Name and Location

Self Employed? *

☐ Yes
☐ No

Employer *

Host Agency Employer?

☐ Yes
☐ No

Starting Wage per Hour

Survey Contact

-- Select a contact --

Supervisor

-- Select a supervisor --

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

High-growth Placement

--- Please select a value ---

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					

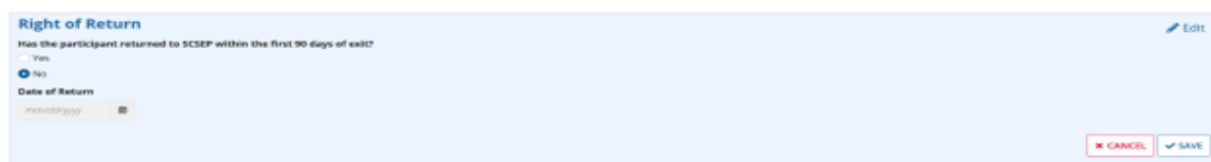
The **Placement** details can also be filled in later. To fill in the details later, click **Placement/Follow-ups** and click **Add Placement**. Note that **Right of Return** data can be entered **after** the **Placement** has been created.

9. Right of Return

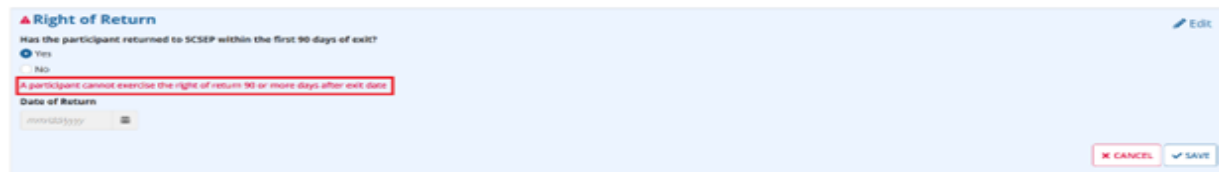
To enter **Right of Return** data, open the **Placement** by clicking on its ID number. Scroll down until the **Right of Return** section is shown and then select the **Edit** button.



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

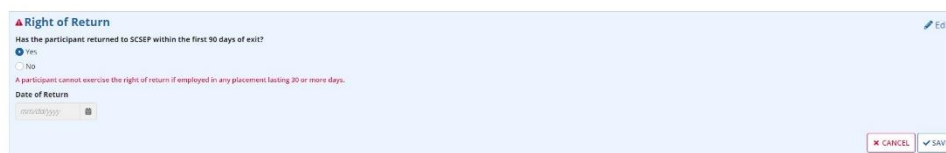


Note that the **Right of Return** data cannot be marked as **Yes** if the participant is attempting to exercise **Right of Return** more than 90 days after their **Exit date**.



A participant also cannot exercise the **Right of Return** if employed in any **Placement** for more than thirty (30) days in a full-time position; however, if they have been placed into a part-time position, they will be able to exercise the **Right of Return** when employed part-time for more than thirty (30) days in that **Placement**.

In the image below, the participant was employed full-time for more than thirty (30) days, so he/she will be unable to exercise the **Right of Return**.



However, in the next image, this participant was in a part-time (10 hours per week) **Placement** for more than thirty (30) days; therefore, he/she will be allowed the **Right of Return**.

Right of Return
Edit

Has the participant returned to SCSEP within the first 90 days of exit?

☒ Yes
 ☐ No

Date of Return *

CANCEL SAVE

After entering the Date of Return and pressing the SAVE button, the status of the participant will change from Exited-In Follow-Up to Active. Their Participant History will show the previous Assignment(s) and Placement(s) and they can now be given a new Assignment in the program.

Samantha Smith (Case ID: 10885356)

Summary
 Assignments
 Participant Required Actions
 Participant History
 Extensions
 Related Actions

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

Participant Summary

Participant Name Samantha Smith	Participant ID CMS010018533	State New Jersey	Case ID 10885356
Grant Number AD382882260A35	Age 73	County Somerset County	Enrollment Date 01/01/2023
Is Re-Enrolled No			

Participant History

Case ID	Grantee	Sub-Grantee	Application Date	Status	Exit Date
10885356	New Mexico	SCSEP - New Mexico	01/01/2023	Active	

Assignment History

Assignment ID	Assignment Date	Assignment End Date	Host Agency	Host Agency ID
10932695	01/01/2023	02/01/2023	SQL Code Shop	10601994

Placement History

Employer Name	Employer ID	Start Date	End Date	Placement ID
Code Breakers	10602014	02/01/2023	04/30/2023	12262706

If the **ADD ASSIGNMENT** button is not available, this signifies that not all elements of the Characteristics or Other Enrollment process have been completed. Please navigate to the Characteristics and Other Enrollment screens to complete the required information.

Since the Date of Return was 4/30/2023 in the above example for Samantha Smith, the new Assignment Date should be 4/30/2023 as well. The grantee may allow the participant to continue at the same host agency where they were assigned at the time they exited, or they can start the participant at a new host agency. In either case, since the new Assignment Date will be more than three days after the end of the previous assignment, the Assignment End Date of the previous assignment must first be modified to occur the day before the new assignment starts. A break of type "Right of Return" must be added to this assignment to bridge the gap between the two assignments while the participant was employed (please refer to section 4 for guidance on Adding a Break).

Continuing with this example, the Approved Break Start Date will be one day after the original Assignment End Date of 2/1/2023 (i.e., 2/2/2023), and the Actual End Date will be the same as the revised Assignment End Date (i.e., 4/29/2023). Grantee may add any desired comments as documentation in the Comments box.

AD382882260A35

Is Re-Enrolled
No

Break in Service Details

Assignment *
01/01/2023 - 04/29/2023

Approved Break Start Date *
02/02/2023

Expected End Date
mm/dd/yyyy

Actual End Date
04/29/2023

Is Documentation Provided?
☒ Yes
☐ No

Reason for Approved Break in Participation? *

- ☐ Family/health
- ☐ Personal
- ☐ Administrative
- ☒ Right of Return
- ☐ Other

Comments
Participant exited for p/t employment at Code Breakers, starting 2/1/2023.

74 / 2000

Now add the new assignment to complete the **Right of Return** process.

Participant History

Case Id	Grantee	Sub-Grantee	Application Date	Status	Exit Date
10885356	New Mexico	SCSEP - New Mexico	01/01/2023	Active	

Assignment History

Assignment ID	Assignment Date	Assignment End Date	Host Agency	Host Agency ID
10932695	01/01/2023	04/29/2023	SQL Code Shop	10601994
10932706	04/30/2023		Covenant House	10274867

Break History

Break ID	Start Date	Expected End Date	Actual End Date
9478280	02/02/2023		04/29/2023

Placement History

Employer Name	Employer ID	Start Date	End Date	Placement ID
Code Breakers	10602014	02/01/2023	04/30/2023	12262706

10. Manage Follow-Ups

Details of Follow-up data for a participant who has been placed in unsubsidized employment after exit can be entered in the section of the Placement form called **Follow-Up Details**. You can either add details as you are entering Placement/Follow-up details initially or click the **Edit** button on the right-hand side of the screen for the section.

Follow Up Details

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

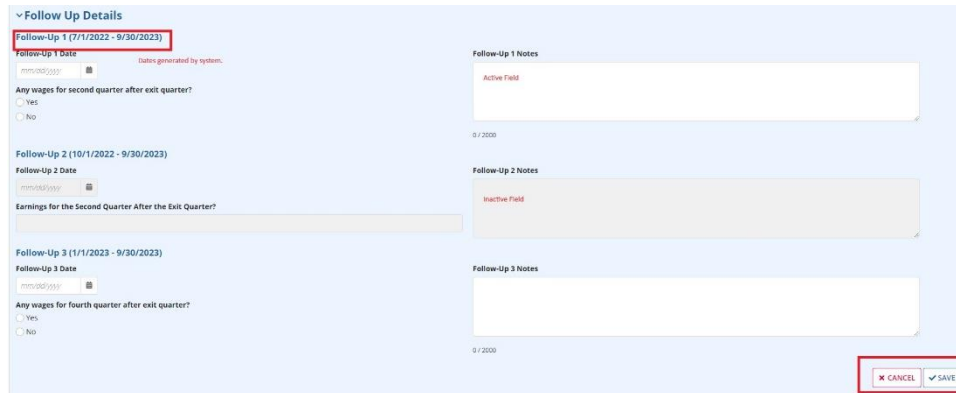
Follow-Up 1 Date

Follow-Up 1 Notes

Any wages for second quarter after exit quarter?

Edit

On this form, the date ranges are automatically generated by the system. These are the earliest and latest dates within which the relevant Follow-up should be completed. Fields on the screen allow you to enter details for each Follow-up for this Placement. The system may make some fields active and others inactive. For example, as seen in the screenshot below, the fields for Follow-up 2 are inactive since Follow-up 1 has not yet been completed.



Follow Up Details

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

Follow-Up 1 Date: mm/dd/yyyy (dates generated by system.)

Any wages for second quarter after exit quarter?

☐ Yes

☐ No

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 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 1 Notes

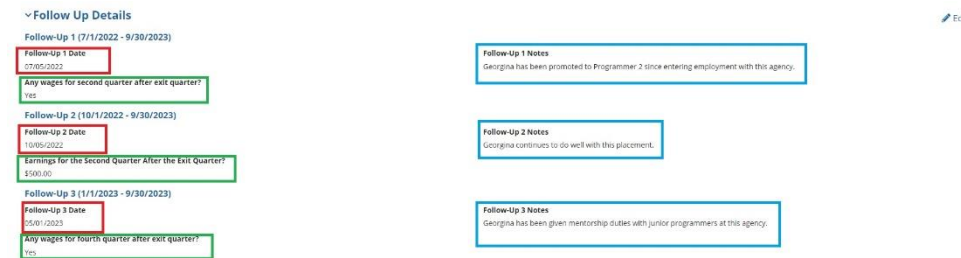
Active Field

Follow-Up 2 Notes

Inactive Field

Follow-Up 3 Notes

The screenshot below shows an example of a participant's Placement with all three Follow-ups completed.



Follow Up Details

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

Follow-Up 1 Date: 07/05/2022

Any wages for second quarter after exit quarter?

☒ Yes

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

Follow-Up 2 Date: 10/05/2022

Earnings for the Second Quarter After the Exit Quarter?

\$500.00

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

Follow-Up 3 Date: 05/01/2023

Any wages for fourth quarter after exit quarter?

☒ Yes

Follow-Up 1 Notes

Georgina has been promoted to Programmer 2 since entering employment with this agency.

Follow-Up 2 Notes

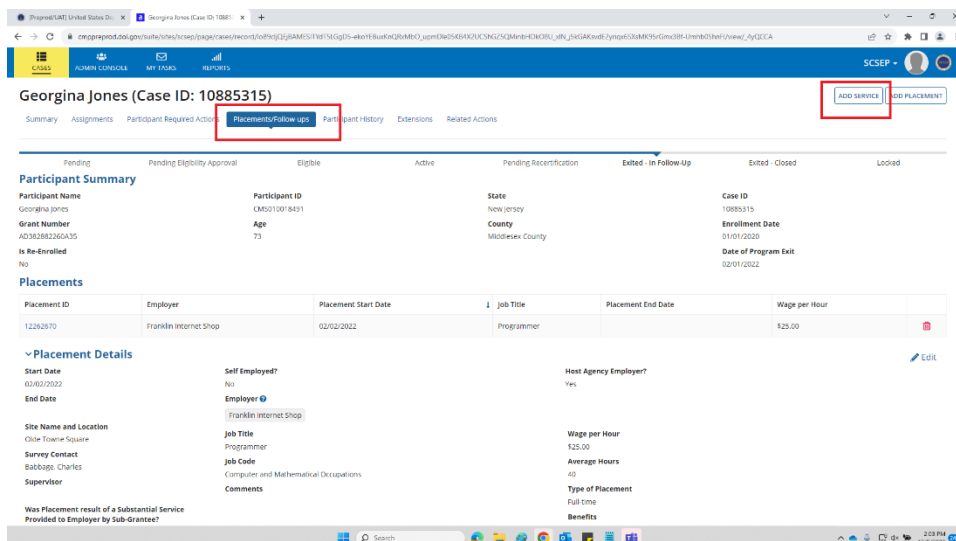
Georgina continues to do well with this placement.

Follow-Up 3 Notes

Georgina has been given mentorship duties with junior programmers at this agency.

11. Add Placement-Related Service

To add a **Service** to a participant who has been placed in unsubsidized employment, click the **ADD SERVICE** button in the upper right-hand corner of the **Placements/Follow-ups** tab.



Georgina Jones (Case ID: 10885315)

Participant Summary

Participant Name	Participant ID	State	Case ID
Georgina Jones	0MS010018491	New Jersey	10885315
Grant Number	Age	County	Enrollment Date
AD382882260A35	73	Middlesex County	01/01/2020
Is Re-Enrolled	Date of Program Exit		
No	02/01/2022		

Placements

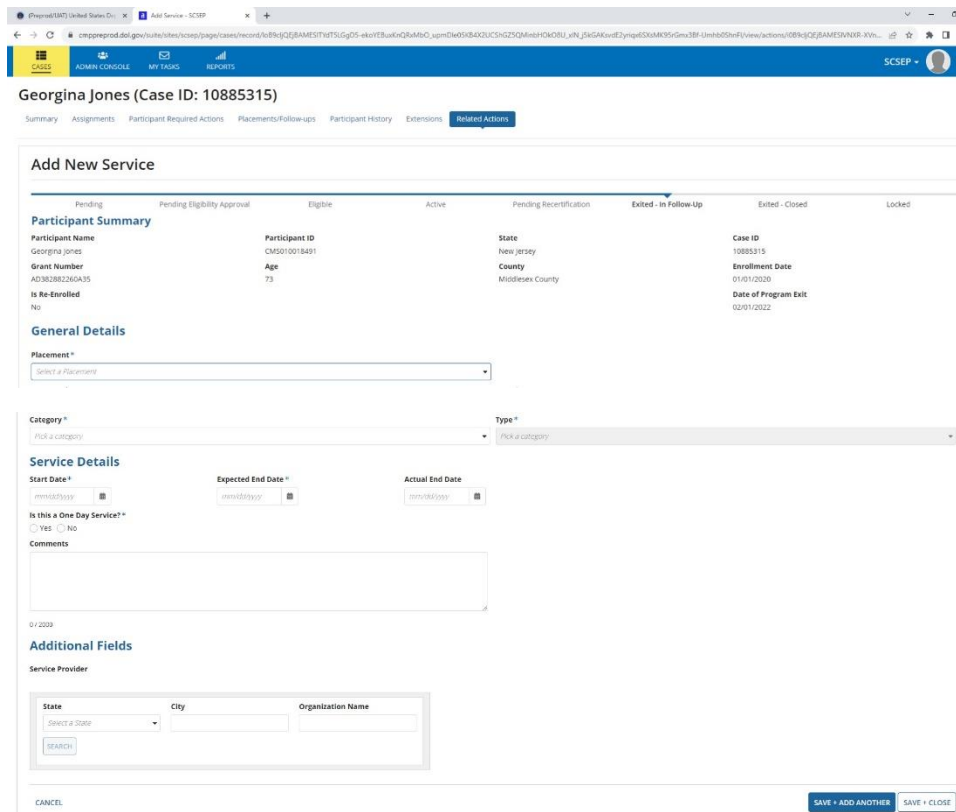
Placement ID	Employer	Placement Start Date	Job Title	Placement End Date	Wage per Hour
12262970	Franklin Internet Shop	02/02/2022	Programmer		\$25.00

Placement Details

Start Date	Self Employed?	Host Agency Employer?
07/02/2022	No	Yes
End Date	Employer	Job Title
	Franklin Internet Shop	Programmer
Site Name and Location	Job Code	Wage per Hour
Old Towne Square	Computer and Mathematical Occupations	\$25.00
Survey Contact	Comments	Average Hours
BalBate, Charles		40
Supervisor	Type of Placement	Full Time
	Benefits	

Was Placement result of a Substantial Service Provided to Employer by Sub-Grantee?

This opens the **Add New Service** screen, which can also be accessed via the **Related Actions** tab.



Georgina Jones (Case ID: 10885315)

Summary Assignments Participant Required Actions Placements/Follow-ups Participant History Extensions **Related Actions**

Add New Service

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

Participant Summary

Participant Name Georgina Jones	Participant ID CH2010015401	State New Jersey	Case ID 10885315
Grant Number AD382882260435	Age 73	County Middlesex County	Enrollment Date 01/01/2020
Is Re-Enrolled No			Date of Program Exit 02/01/2022

General Details

Placement *
Select a Placement

Category *
Pick a category

Type *
Pick a category

Service Details

Start Date *
mm/dd/yyyy

Expected End Date *
mm/dd/yyyy

Actual End Date
mm/dd/yyyy

Is this a One Day Service? *
☐ Yes ☐ No

Comments

01/2023

Additional Fields

Service Provider

State
Select a State

City

Organization Name

SEARCH

CANCEL SAVE + ADD ANOTHER SAVE + CLOSE

Move through the dropdowns and text fields to add a service. As you complete the **General Details** (starting with **Placement**), subsequent fields will become active (**Category** and **Type**) or appear (**Sub-Category**).

The **Placement** dropdown allows you to select the placement to which you are adding **Services**.



General Details

Placement *
Select a Placement

Programmer, Placement Date - 2/2/2022

Type *
Pick a category

The **Category** dropdown allows you to select either **Follow-Up Services** or **Supportive Services**.



Placement *
Programmer, Placement Date - 2/2/2022

Category *
Pick a category

Follow-Up Services

Supportive Services

Type *
Pick a category

mm/dd/yyyy mm/dd/yyyy mm/dd/yyyy

Is this a One Day Service? *
☐ Yes ☐ No

Selecting **Follow-Up Services** allows you to pick from several categories in the **Type** dropdown.

Placement*
 Programmer, Placement Date - 2/2/2022

Category*
 Follow-Up Services

Service Details

Start Date* **Expected End Date** **Actual End Date**

Is this a One Day Service?*
☐ Yes ☐ No

Comments

Type*
 Pick a category
 Pick a category
 Counsel Participant on Job-Related Issues
 Help Participant Get Another Job
 Intervention with Employer
 Other (Specify)
 Referrals

Selecting **Supportive Services** allows you to pick from several categories in the **Type** dropdown.

Placement*
 Programmer, Placement Date - 2/2/2022

Category*
 Supportive Services

Service Details

Start Date* **Expected End Date** **Actual End Date**

Is this a One Day Service?*
☐ Yes ☐ No

Comments

Type*
 Pick a category
 Pick a category
 Dependent Care (e.g., Child or Adult Care Assistance)
 Educational or Occupational Licensing and Testing Fees
 Food Assistance
 Health and Medical Services (e.g., RX, Eye Glasses, Medical Test)
 Housing (e.g., Temporary Housing Assistance)
 Needs-related Payment (e.g., Utilities)
 Other (Specify)
 Special Job-related or Personal Counseling
 Transportation Assistance
 Work Related Assistance (e.g., Uniform, Badges, Tools)

If you select **Referrals** for **Type** under **Follow-Up Services**, a new dropdown will appear, **Sub-Category**. This allows you to select **Additional Training**, **Employment Assistance** or **Other (Specify)**.

Placement*
 Programmer, Placement Date - 2/2/2022

Category*
 Follow-Up Services

Type*
 Referrals

Sub-Category*
 Please select a value
 Please select a value
 Additional Training
 Employment Assistance
 Other (Specify)

Referral Details

Initial Date **Follow-Up Date** **Reason**

Follow-Up Successful ☐ **Follow-Up Completed** ☐

If you select **Other (Specify)** for either **Follow-Up Services** or **Supportive Services**, etc., a text field will appear for entering information about the **Other** service.

General Details

Placement*
 Programmer, Placement Date - 2/2/2022

Category*
 Supportive Services

Type*
 Other (Specify)

Other Type*

You next fill in **Referral Details** (**Initial Date**, **Follow-Up Date**, **Follow-Up Successful** Yes or No, and **Follow-Up Completed**) and select a **Referral Outcome** from the dropdown menu (**Referral Service Received**, **Referral Service not Received**, **Unknown**). You are required to indicate whether the service offered is a **One-Day Service** or not.

General Details

Placement*
 Programmer, Placement Date - 2/2/2022

Category*
 Follow-Up Services

Type*
 Referrals

Sub-Category*
 Additional Training

Referral Details

Initial Date **Follow-Up Date** **Reason**

Follow-Up Successful ☒ Yes ☐ No **Follow-Up Completed**

Referral Outcome
 Please select a value
 Please select a value
 Referral Service Received
 Referral Service not Received
 Unknown

Is this a One Day Service?*
☐ Yes ☐ No

Comments

Finally, you fill in the **Additional Fields** section where you select **Service Provider** information such as **State**, **City** and **Organization Name**.

0 / 2000

Additional Fields
Service Provider

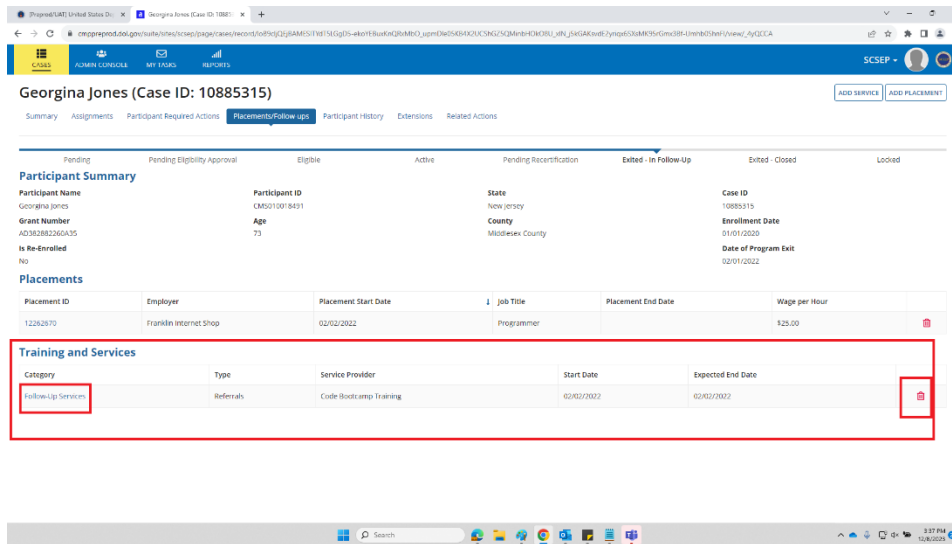
State SELECT A STATE	City	Organization Name
<input type="button" value="SEARCH"/>		

0 / 2000

Additional Fields
Service Provider

Below the **Additional Fields** section are **CANCEL**, **SAVE + ADD ANOTHER** and **SAVE + CLOSE** buttons, that function here as they do on other screens.

On returning to the **Participant Summary** in the **Placements/Follow-ups** tab, any newly added **Training and Services** records are listed on the screen. As with the **Placements** visible on the screen, details on the **Training and Services** are displayed by clicking on the hyperlink name (e.g., **"Follow-Up Services"**). Click the **Bin** icon on the right-hand side of the screen to delete the associated **Training and Services** record.



Georgina Jones (Case ID: 10885315)

Summary Assignments Participant Required Actions **Placements/Follow-ups** Participant History Extensions Related Actions

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

Participant Summary

Participant Name Georgina Jones	Participant ID CR5010018491	State New Jersey	Case ID 10885315
Grant Number AD36288260A35	Age 73	County Middlesex County	Enrollment Date 01/01/2020
Is Re-Enrolled No			Date of Program Exit 02/01/2022

Placements

Placement ID	Employer	Placement Start Date	Job Title	Placement End Date	Wage per Hour
12262570	Franklin Internet Shop	02/02/2022	Programmer		\$25.00

Training and Services

Category	Type	Service Provider	Start Date	Expected End Date
Follow-Up Services	Referrals	Code Bootcamp Training	02/02/2022	02/02/2022

12. Move/Transfer Case

12.1 Move Case

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 (New Jersey)	Fred Smith	1/1/2020		37	Active

Recipient Sub-Grantee

* Grantee: National Older Workers Association (NOWA)
 * Sub-Grantee: --Select a Sub-Grantee--

* Grant: --- Select a Grant ---
 * Case Assigned To: -- Select a Case Manager --

* Movement Effective Date:

[CANCEL](#)
[SUBMIT](#)

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.

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 (New Jersey)	Fred Smith	1/1/2020		37	Active

Recipient Sub-Grantee

* Grantee: National Older Workers Association (NOWA)
 * Sub-Grantee: NOWA (California)

* Grant: National Older Workers Association (NOWA) (Program Y...
 * Case Assigned To: Fred Smith - scsepmp+nowacm@gmail.com - Case Man...

* Movement Effective Date:

[CANCEL](#)
[SUBMIT](#)

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

12.2 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. Donor Grantees can now retroactively add or edit an **Assignment** after a participant has Exited due to a transfer. Please note that an on-screen error message will show if the **Assignment Date**, **Assignment Start Date**, or **Assignment End Date** is later than the **Exit date**.

Discretionary Transfer Request

Participant Information

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

Case Transfer Details

Donor Organization

Recipient Grantee *

Transfer Initiator *
☐ Grantee ☐ Participant

Reason For Transfer *

Requested Effective Date *

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.

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	CMS010 005586	Durational Limit Date	Dec 30, 2024	Grant Number	AD3722 6216001
-------------------------------	-------	------------------------------	------	-----------------------	------------------	------------------------------	-----------------	---------------------	-------------------

Case Transfer Details

Donor Organization

National Older Workers Association (NOWA)

Recipient Grantee *

New Mexico X

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.

Discretionary Transfer Request

Participant Information

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

Case Transfer Details

Donor Organization

National Older Workers Association (NOWA)

Recipient Grantee *

New Mexico X

Transfer Initiator *

☐ Grantee ☒ Participant

Reason For Transfer *

Participant is moving

Requested Effective Date *

01/01/2022

Address Before Transfer	Address After Transfer
Mailing Address Address 90 Excess Avenue Franklin, New Jersey 08823 County of Residence Somerset County	Mailing Address Address Line 1 * <input type="text" value="6 Juniper Lane"/> Address Line 2 <input type="text"/> City * State * Zip * Zip+4 <input type="text" value="Santa Fe"/> <input type="text" value="New Mexico"/> <input type="text" value="90054"/> <input type="text"/> County of Residence * <input type="text" value="Santa Fe County"/>
Comment <input type="text"/>	
Donor Certification * <input checked="" type="checkbox"/> 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.	
<div> <input type="button" value="CANCEL"/> <input type="button" value="SUBMIT"/> </div>	

13. Recertify Case

A user with the role of Case Manager or above may initiate the Recertification Process. Users may edit data submitted in the recertification prior to submission for approval. Recertifications will be approved by the Supervisor or higher-level user. Users may edit data submitted in the recertification prior to submission for approval. 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 **No** for **Signature of Participant on Recertification, Signature of Director or Authorized Representative on Recertification** will not allow the user to **SAVE + CONTINUE.**

Recertification Details

Recertification Date *

03/01/2022

Number in Family *

4

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 *

\$12,000.00

125% of poverty level threshold \$32,750.00

Signature of participant on Recertification? *

☒ Yes

☐ No

Application Date

02/02/2022

Is Family Income at or below 125% poverty level?

☒ Yes

☐ No

Recertification Signature

Signature of director or authorized representative on recertification? *

☐ Yes

☒ No

CLOSE

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

Recertification Signature

Signature of director or authorized representative on recertification? *

☐ Yes

☒ No

CLOSE

SAVE + CONTINUE

Choosing **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 

Application Date

01/01/2020

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

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

Grant Lore

Participant ID

CMS010005586

State

New Jersey

Case ID

10869115

Status

Active

Age

73

County

Somerset County

Enrollment Date

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:

- 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:

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

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Related Actions](#)

Participant Summary

Participant Name John John	Participant ID CMS099002376	State District of Columbia	Case ID 99002400
Status Active	Age 61	County District of Columbia	Enrollment Date 02/23/2022
Grant Number 55745			

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

Comment

[PREVIOUS](#)
[SUBMIT](#)

Participant Summary

Participant Name Grant Lore	Participant ID CMS010005586	State New Jersey	Case ID 10869115
Status Active	Age 73	County Somerset County	Enrollment Date 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

Comment

[PREVIOUS](#)
[SUBMIT](#)

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](#)

The approval of a recertification must be approved by a Supervisor or higher-level user. The Supervisor (or higher-level user) will receive a task to approve the Recertification.

☰ All Tasks and Notifications for Edmasup Denk

☑ Case Tasks

☰ All Tasks

⚠ Past Due

⌚ Due Soon

⌚ Upcoming

⬆ Escalated

+ Show Filters

Participant Name	Participant ID	Case ID	Case Status	Task Type	Escalated?	Due Date ↑	Status	Description
Recert Example	10018534	10885357	Pending Recertification	Recertification	—	12/27/2023	🔄	Please review the recertification request before: 12/27/2023

+ Show Columns

Upon receiving the notification, the approver may edit recertification data prior to approval. Otherwise, the approver should select the button **Approve Recertification** in the top right corner to continue.

CASES
 ADMIN CONSOLE
 MY TASKS
 REPORTS

SCSEP

Recert Example (Case ID: 10885357)

[Summary](#)
[Assignments](#)
[Participant Required Actions](#)
[Participant History](#)
[Extensions](#)
[Related Actions](#)

[Summary](#) | [Intake](#) | [Eligibility](#) | [Recertification](#) | [Characteristics](#) | [Other Enrollment Information](#)

Participant Summary

Participant Name Recert Example	Participant ID CMS010018534	State Maine	Case ID 10885357
---	---------------------------------------	-----------------------	----------------------------

[Edit](#)

Recertification (12/20/2023)

Recertification Details

Recertification Date 12/20/2023	Application Date 05/01/2021
Number in Family 2	Is Family Income at or below 125% poverty level? Yes
Total Includable Family Income \$23,000.00	
Total Includable family income during the 12-month eligibility determination period SCSEP Eligible? Yes	
Signature of participant on Recertification? Yes	

Recertification Signature

Signature of director or authorized representative on recertification? No	
Comments	

In the approval screen, the approver may override initial Eligibility Determination by providing comments. If the approver decides the participant is ineligible, they will need to give a reason for ineligibility and any additional applicable steps, while also providing comments.

Requester Information

Requester's Name edMacasengr, Derik

Requester's Email scsepmpir+edmacm@gmail.com

Request Date 12/20/2023

Eligibility Determination

SCSEP Eligible?

☐ Yes

☒ No

Reason for Ineligibility *

☐ Age

☐ Residence outside of state

☐ Employed

☐ Income

☐ Failed to file complete Application

☐ Other

Action Taken if Ineligible *

☐ Referred to One-Stop

☐ Referred to Social Services

☐ Referred to another project

☐ Placed in unsubsidized employment pursuant to MOU

☐ Other

Comment *

If the recertification is approved, click the checkbox to authorize. You may also change the date of the Recertification Determination Date.

Authorization

Click the checkbox to authorize *

☒ I hereby certify that the applicant is eligible for the Senior Community Service Employment Program (SCSEP) program.

Recertification Determination Date *

12/20/2023

This date will be reflected as the Recertification Determination Date on the Participant Summary Screen/Eligibility tab.

Signed By edMASup Denik

Timestamp Dec 20, 2023 11:52 AM

Manage Program Introduction

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

▼ Participant Summary

Participant Name Grant Lore	Participant ID CMS010005586	State New Jersey	Case ID 10869115
Status Active	Age 73	County Somerset County	Enrollment Date 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.

The Assign Case function allows a Supervisor, Sub-Grantee Administrator, and Grantee Administrator to reassign existing cases within a sub-grantee from one case worker to a different case manager.

From the SCSEP Landing Page

1. Select CASES to display the SCSEP Cases page.
2. Click the Show Filters button.

[+ Show Filters](#)

3. Click Reset to clear all selections and begin a new search

RESET

4. Select the Grantee, Sub-Grantee, and Case Assigned To from the drop-down, and click Search.

Grantee

--Select a Grantee--

Sub-Grantee

--Select a Sub-Grantee--

Case Assigned To

-- Select a Case Manager --

RESET

SEARCH

This will display all cases assigned to the selected individual. Select the case(s) to be reassigned or select the top box to auto select all cases. Proceed to the next page and continue selecting cases until you have selected all the cases to be reassigned.

- Once you have selected all the cases to be reassigned, select REASSIGN from the Select an Action dropdown field.

REASSIGN

Select an Action

RECERTIFY

MOVE

REASSIGN

TRANSFER

WITHDRAW

- Click SUBMIT to continue to the next page.

Participant Cases

ADD NEW CASE

REASSIGN

SUBMIT

- Once the Reassign Cases screen appears, select the Case Assigned To from the dropdown menu.

Reassign Cases

Selected Cases

Case ID	Participant Name	Participant ID	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
10790029	Alyce Weber	9969329	WIS35 SER National Wt: 5 Fond Du Lac	Juanita McClelland	01/05/2018	01/29/2018	25	Exited - In Follow-Up

Case Assigned To *

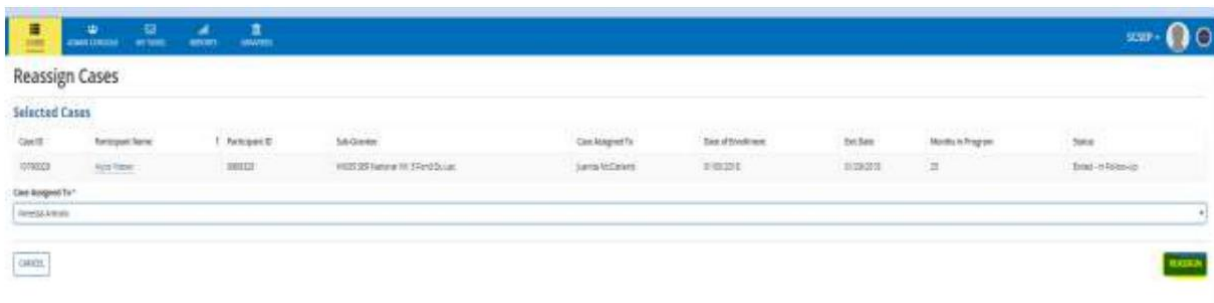
Patrice Lewis

- Select the newly assigned Case Worker from the drop down.



The screenshot shows the 'Reassign Cases' page with the 'Case Assigned To' dropdown menu open. The dropdown list contains the following options: 'Patrice Lewis', 'Juanita McClelland', and 'Juanita McClelland'. The 'Patrice Lewis' option is highlighted in yellow, indicating it is the selected case worker.

- Click the Reassign button to assign all cases to the new assignee.

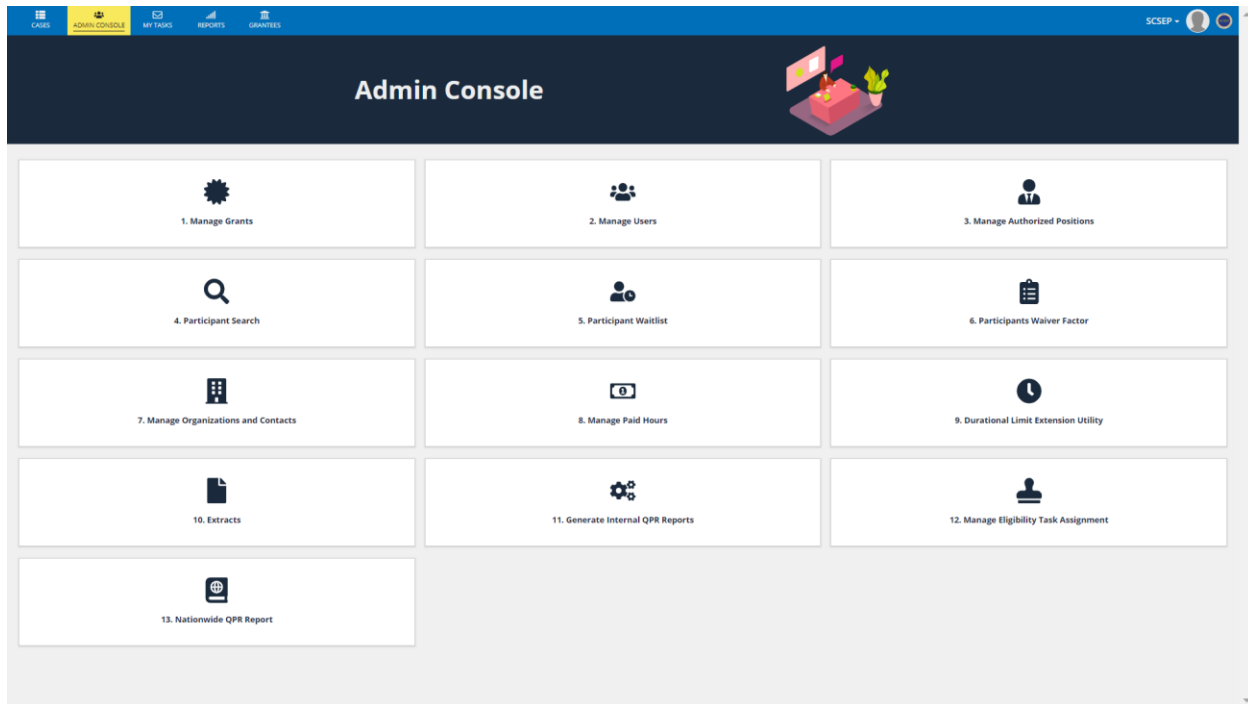


The screenshot shows the 'Reassign Cases' page with the 'Case Assigned To' dropdown menu open. The dropdown list contains the following options: 'Patrice Lewis', 'Juanita McClelland', and 'Juanita McClelland'. The 'Patrice Lewis' option is highlighted in yellow, indicating it is the selected case worker. The 'Reassign' button is highlighted in green, indicating it is the button to click to assign all cases to the new assignee.

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.

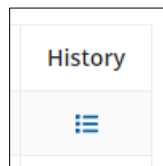
CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

Manage Multiple Case Extensions

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

CANCEL
RESET
SELECT PARTICIPANTS
ADD EXTENSION

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



Manage Multiple Case Extensions

←
Wayne Brady

▼ Waiver Factors

Severe Disability 4/14/2022
Old Enough but Not Receiving SS Title I 4/14/2022
Limited English Proficiency

Frail 4/14/2022
Severely Limited Employment Prospects 4/14/2022
Low Literary Status 4/14/2022

75 or Older
Formerly Incarcerated

- 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).

<input type="checkbox"/>	Last Name	First Name	Participant Id
<input checked="" type="checkbox"/>	Brady	Wayne	498091
<input type="checkbox"/>	Windsor	Elizabeth	498088
<input checked="" type="checkbox"/>	London	Diana	484794

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

<input type="checkbox"/>	Last Name	First Name	Participant Id
<input type="checkbox"/>	Brady	Wayne	498091
<input type="checkbox"/>	Windsor	Elizabeth	498088
<input type="checkbox"/>	London	Diana	484794

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

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

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

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.

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

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 *

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

<input type="checkbox"/>	Last Name	First Name	Participant Id	Grantee	Sub-Grantee	Durational Limit Date	Status	History
<input checked="" type="checkbox"/>	Brady	Wayne	498091	Maryland	MD003 Caroline County	6/3/2022	Active	[i]
<input type="checkbox"/>	Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	[i]
<input type="checkbox"/>	London	Diana	484794	Maryland	MD012 Baltimore City	7/4/2026	Locked	[i]

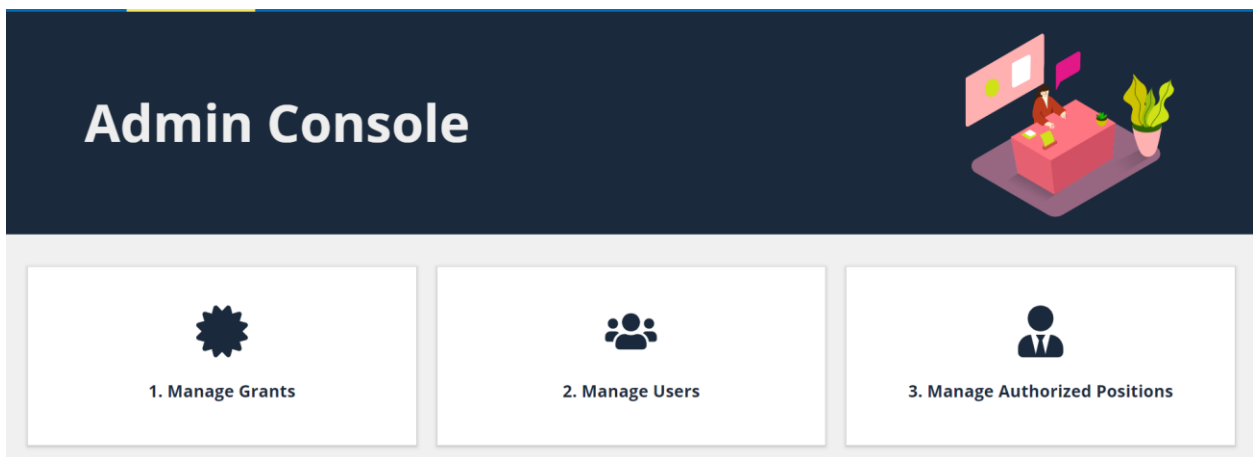
Certification of Extension Request *
☒ I, as grantee administrator, hereby certify that each of the participants for whom I am requesting an extension qualifies for such an extension under the individual durational limit policy of this grantee.

Approved By *

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



Manage National Older Workers Association (NOWA) Grants

Grantee Summary

Grantee Name	Grantee Code	National Grantee
National Older Workers Association (NOWA)	12345	Yes
Active	Date First Active	Date Last Active
Yes	01/01/2015	
Region		
Region		

Grant Filters

Program Year

-- Select a Program Year --

Grants

Grant Number	Program Year
AD37226216001	2020

CLOSE

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

Manage National Older Workers Association (NOWA) Grants

Grantee Summary

Grantee Name	Grantee Code	National Grantee
National Older Workers Association (NOWA)	12345	Yes
Active	Date First Active	Date Last Active
Yes	01/01/2015	
Region		
Region		

Grant Filters

Program Year

2020

Grants

Grant Number	Program Year
AD37226216001	2020

CLOSE

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**.

Edit Grant

Grantee Summary

Grantee Name	Grantee Code	National Grantee
National Older Workers Association (NOWA)	12345	Yes
Active	Date First Active	Date Last Active
Yes	01/01/2015	
Region		
Region		

Grant Summary

Grant Number	Program Year
AD37226216001	2020

[ADD SUB-GRANTEE TO GRANT](#)

Search Sub-Grantees

[Reset](#) | [Search](#)

Linked Sub-Grantees

[SUBMIT](#)

Grant Access Grid

<input type="checkbox"/>	Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/>	NOWA (California)	12347		Sub-Grantee	Active; Active; Active
<input type="checkbox"/>	NOWA (New Jersey)	12346		Sub-Grantee	Active; Active; Active
<input type="checkbox"/>	NOWA (Puerto Rico)	12348		Sub-Grantee	Active; Active; Active

[CLOSE](#)

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.

ADD Sub-Grantees To Grant

Grantee Summary

Grantee Name National Older Workers Association (NOWA)	Grantee Code 12345	National Grantee Yes
Active Yes	Date First Active 01/01/2015	Date Last Active
Region Region		

Grant Summary

Grant Number AD37226216001	Program Year 2020
--------------------------------------	-----------------------------

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status	
No Grant Access is Available					
+ ADD NEW					

[CANCEL](#)
[SUBMIT](#)

- 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.

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status	
<input type="text" value="Start typing Sub-Grantee's Name to pick from available options"/>					×
+ ADD NEW					

[CANCEL](#)
[SUBMIT](#)

- 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.

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
<input type="text" value="a"/>				<input type="checkbox"/>
NOWA (California)				<input type="checkbox"/>
NOWA (New Jersey)				<input type="checkbox"/>
NOWA (Puerto Rico)				<input type="checkbox"/>

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

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
NOWA (California) <input type="checkbox"/>				<input type="checkbox"/>
NOWA (Puerto Rico) <input type="checkbox"/>				<input type="checkbox"/>

- 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.

Your unsaved data will be lost if you continue. Are you sure that you want to cancel?

- 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

- 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**.

Linked Sub-Grantees

Select an Action: SUBMIT

Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/> MD001 Allegany County	MD001		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD002 Calvert County	MD002		Sub-Grantee	Active
<input type="checkbox"/> MD003 Caroline County	MD003		Sub-Grantee	Active
<input type="checkbox"/> MD004 Charles County	MD004		Sub-Grantee	Active
<input type="checkbox"/> MD005 Garrett County	MD005		Sub-Grantee	Active
<input type="checkbox"/> MD007 Queen Anne's County	MD007		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD008 St. Mary's County	MD008		Sub-Grantee	Active
<input type="checkbox"/> MD009 Talbot County	MD009		Sub-Grantee	Active
<input type="checkbox"/> MD010 Washington County	MD010		Sub-Grantee	Active

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

Linked Sub-Grantees

Select an Action: SUBMIT

Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input checked="" type="checkbox"/> Sub-Grantee				
<input checked="" type="checkbox"/> MD001 Allegany County	MD001		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD002 Calvert County	MD002		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD003 Caroline County	MD003		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD004 Charles County	MD004		Sub-Grantee	Active
<input checked="" type="checkbox"/> MD005 Garrett County	MD005		Sub-Grantee	Active

- Under the **Linked Sub-Grantees** subheading, click the arrow on the **Select an Action** dropdown.
- Select **Remove from Grant**. The **SUBMIT** button is no longer grayed out and can be clicked.
- 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).

Are you sure that you want to remove the selected Sub-Grantee(s) from this Grant?

NO YES

3. Manage Users

This section covers user management for Sub-Grantees.

- Add User
- Update User
- Add Read Only User

Manage Users



Grantee Selection

Instructions

You have Grant access to Multiple Grantee Organizations. Please select a Grantee Organization to view grants.

User Organizations

Grantee *

--Select a Grantee--

Sub-Grantee *

--Select a Sub-Grantee--

Add Global Read Only User

☐ Yes

☐ No

CANCEL

SUBMIT

3.1 Add User

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

User Organizations

Grantee *

National Older Workers Association (NOWA)

Sub-Grantee *

NOWA (California)

Add Global Read Only User

☐ Yes

☐ No

CANCEL

SUBMIT

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

NOWA (California) Users

Sub-Grantee Summary

Sub-Grantee Name
NOWA (California)

Sub-Grantee Code
12347

Region
Region

Active
Yes

Date First Active
01/01/2020

Date Last Active

ADD USER

Search Users

Search by Name

[Reset](#) | [Search](#)

Username	Name	Role	Work Phone	Email	Supervisor
scsepmpr+nowaga@gmail.com	Sarah Labor	CMS SCSEP Sub Grantee Administrator		scsepmpr+nowaga@gmail.com	
scsepmpr+nowasup@gmail.com	Bob Jones	CMS SCSEP Grant Supervisor		scsepmpr+nowasup@gmail.com	
scsepmpr+nowacm@gmail.com	Fred Smith	CMS SCSEP Grant Case Manager		scsepmpr+nowacm@gmail.com	Bob Jones

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

Add New User

Sub-Grantee Summary

Sub-Grantee Name
NOWA (California)

Sub-Grantee Code
12347

Region
Region

Active
Yes

Date First Active
01/01/2020

Date Last Active

› Audit History

Username And Role

Username*

Hannah Murphy [×](#)

***Role** Cms Scsep Grant Case Manager ▼

***Supervisor** Bob Jones ▼

User Basic Info

First Name *	Last Name *
<input type="text" value="Hannah"/>	<input type="text" value="Murphy"/>
Work Phone	Email *
<input type="text"/>	<input type="text" value="scsepmpmr+nowacm2@gmail.com"/>

User Details

Relationship to SCSEP *

* ☒ I certify that this user account is for an employee or contractor working under the direct supervision of the grantee/sub-grantee or of an entity that has a legally binding sub-grantee relationship with the grantee/sub-grantee or participant staff.

CANCEL

ADD USER

3.2 Update User

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

User Organizations

Grantee *	Sub-Grantee *
<input type="text" value="National Older Workers Association (NOWA)"/>	<input type="text" value="NOWA (California)"/>
Add Global Read Only User	
<input type="radio"/> Yes <input type="radio"/> No	
CANCEL	SUBMIT

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

NOWA (California) Users

Sub-Grantee Summary

Sub-Grantee Name	Sub-Grantee Code	Region
NOWA (California)	12347	Region
Active	Date First Active	Date Last Active
Yes	01/01/2020	
ADD USER		

Search Users

[Reset](#) | [Search](#)

Username	Name	Role	Work Phone	Email	Supervisor
scsepmpr+nowacm2@gmail.com	Hannah Murphy	CMS SCSEP Grant Case Manager		scsepmpr+nowacm2@gmail.com	Bob Jones
scsepmpr+nowaga@gmail.com	Sarah Labor	CMS SCSEP Sub Grantee Administrator		scsepmpr+nowaga@gmail.com	
scsepmpr+nowasup@gmail.com	Bob Jones	CMS SCSEP Grant Supervisor		scsepmpr+nowasup@gmail.com	
scsepmpr+nowacm@gmail.com	Fred Smith	CMS SCSEP Grant Case Manager		scsepmpr+nowacm@gmail.com	Bob Jones

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

User Hannah Murphy

Sub-Grantee Summary

Sub-Grantee Name

NOWA (California)

Sub-Grantee Code

12347

Region

Region

Active

Yes

Date First Active

01/01/2020

Date Last Active

> Audit History

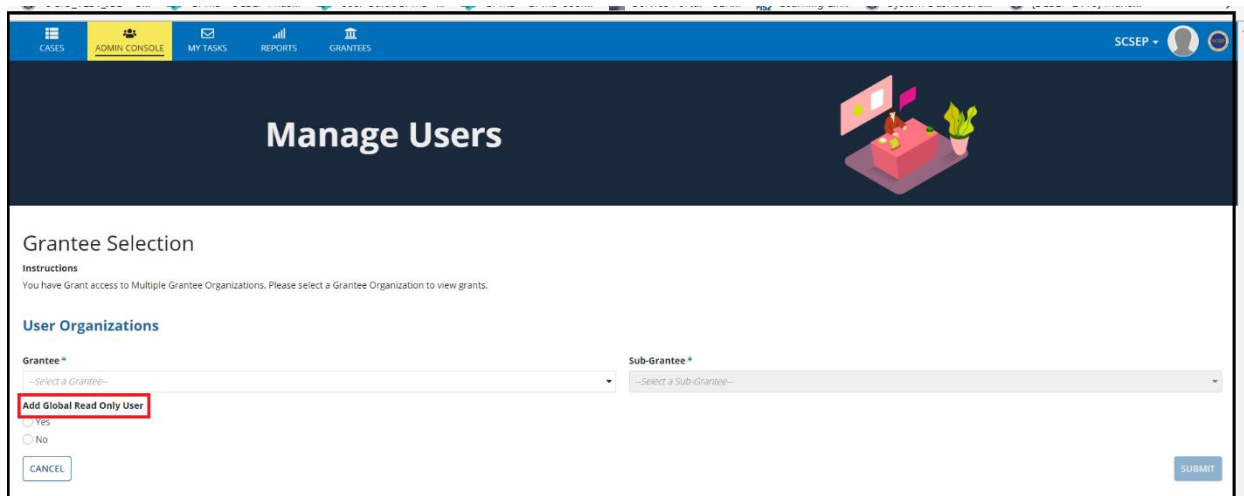
Username And Role

Username *

*** Role**

* ☒ I certify that this user account is for an employee or contractor working under the direct supervision of the grantee/sub-grantee or of an entity that has a legally binding sub-grantee relationship with the grantee/sub-grantee or participant staff.

3.3 Add Read Only User



Manage Users

Grantee Selection

Instructions
You have Grant access to Multiple Grantee Organizations. Please select a Grantee Organization to view grants.

User Organizations

Grantee *
--Select a Grantee--

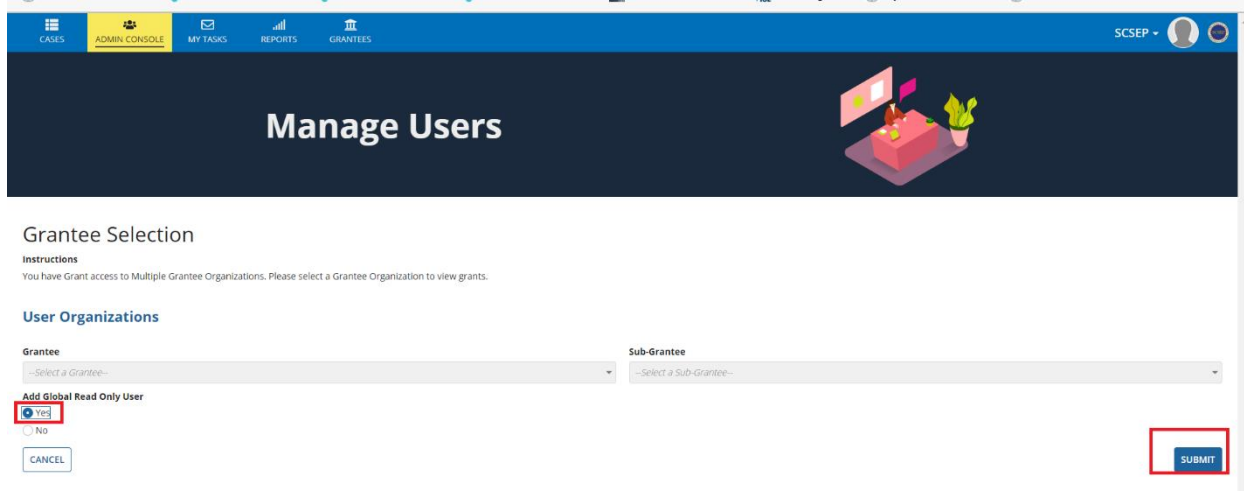
Sub-Grantee *
--Select a Sub-Grantee--

Add Global Read Only User

☐ Yes

☐ No

CANCEL SUBMIT



Manage Users

Grantee Selection

Instructions
You have Grant access to Multiple Grantee Organizations. Please select a Grantee Organization to view grants.

User Organizations

Grantee
--Select a Grantee--

Sub-Grantee
--Select a Sub-Grantee--

Add Global Read Only User

☒ Yes

☐ No

CANCEL SUBMIT

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

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

SCSEP

Add Global Read Only User

Username And Role

Username *

Charlie CM Demo

* Role

-- Select A User Role --
-- Select A User Role --
Cms Scsep Grant Read Only

User Basic Info

First Name *

Charlie

Last Name *

CM Demo

Work Phone

Email *

newuser@dol.gov

User Details

Relationship to SCSEP *

-- Please select a value --

☒ I certify that this user account is for an employee or contractor working under the direct supervision of the grantee/sub-grantee or of an entity that has a legally binding sub-grantee relationship with the grantee/sub-grantee or participant staff.

CANCEL

ADD USER

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

SCSEP

Add Global Read Only User

Username And Role

Username *

Lauren Jasper

* Role

Cms Scsep Grant Read Only

User Basic Info

First Name *

Lauren

Last Name *

Jasper

Work Phone

Email *

scsepmp+nowacm3@gmail.com

User Details

Relationship to SCSEP *

Employee

☒ I certify that this user account is for an employee or contractor working under the direct supervision of the grantee/sub-grantee or of an entity that has a legally binding sub-grantee relationship with the grantee/sub-grantee or participant staff.

CANCEL

ADD USER

8. Action Completed message is displayed

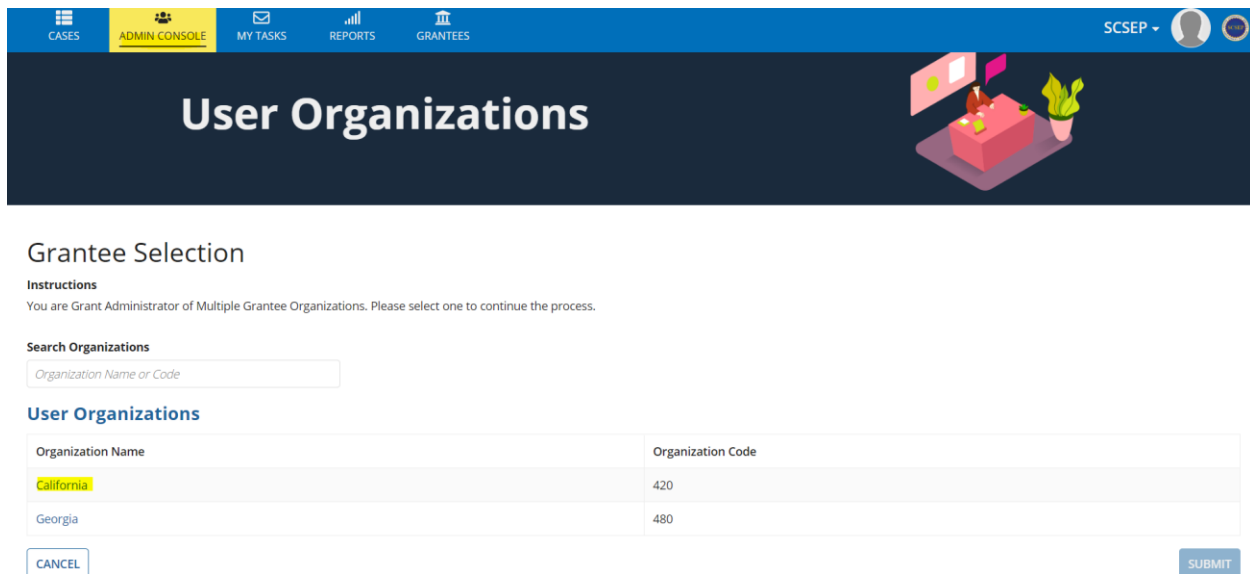
Note: To add **Read Only Restricted** user, follow same steps to add any other user role in the system.

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.



User Organizations

Grantee Selection

Instructions
You are Grant Administrator of Multiple Grantee Organizations. Please select one to continue the process.

Search Organizations
Organization Name or Code

Organization Name	Organization Code
California	420
Georgia	480

CANCEL **SUBMIT**

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 2021

State -- Select a State --

Authorized Positions Summary

Program Year 2021

Authorized Positions 317 Allocated Authorized Positions 89 Authorized Positions Remaining 211 Modified Positions

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

5 items

CLOSE

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.

Authorized Positions Allocation

Authorized Positions Summary

Program Year: 2021 Grantee: Swap Test #1 County: Prince William County State: Virginia
 Authorized Positions: 5 Allocated Authorized Positions: 0 Authorized Positions Remaining: 5 Modified Positions: N/A

Total No. of Authorized Positions Remaining to be Allocated: 5

Allocated Authorized Positions

Sub-Grantee Name	Allocated Authorized Positions	Modified Positions
<input type="text"/> <small>Start typing Sub-Grantee's Name to pick from available options</small>		N/A
Add New Allocation		

[CANCEL](#)
[SAVE + CONTINUE](#)
[SAVE + CLOSE](#)

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.

Authorized Positions Allocation

Authorized Positions Summary

Program Year: 2021 Grantee: Swap Test #1 County: Prince William County State: Virginia
 Authorized Positions: 5 Allocated Authorized Positions: 0 Authorized Positions Remaining: 5 Modified Positions: N/A

Total No. of Authorized Positions Remaining to be Allocated: 5

Allocated Authorized Positions

Sub-Grantee Name	Allocated Authorized Positions	Modified Positions
<input type="text"/> <small>Start typing Sub-Grantee's Name to pick from available options</small>		N/A
Swap Sub #1 Swap Sub #2 Swap Test #1		

[CANCEL](#)
[SAVE + CONTINUE](#)
[SAVE + CLOSE](#)

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.

Authorized Positions Allocation

Authorized Positions Summary

Program Year: 2021 Grantee: Swap Test #1 County: Prince William County State: Virginia
 Authorized Positions: 5 Allocated Authorized Positions: 1 Authorized Positions Remaining: 4 Modified Positions: N/A

Total No. of Authorized Positions Remaining to be Allocated: 4

Allocated Authorized Positions

Sub-Grantee Name	Allocated Authorized Positions	Modified Positions
Swap Sub #2	1	N/A

[Add New Allocation](#)

[CANCEL](#)

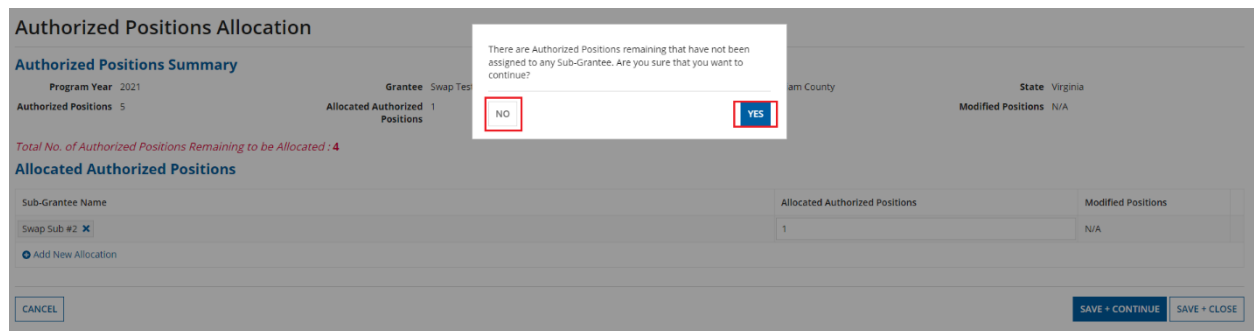
[SAVE + CONTINUE](#)

[SAVE + CLOSE](#)

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



The screenshot shows the same interface as before, but with a modal dialog box in the center. The dialog box contains the text: "There are Authorized Positions remaining that have not been assigned to any Sub-Grantee. Are you sure that you want to continue?". Below the text are two buttons: "NO" and "YES". The "YES" button is highlighted with a red border.

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.

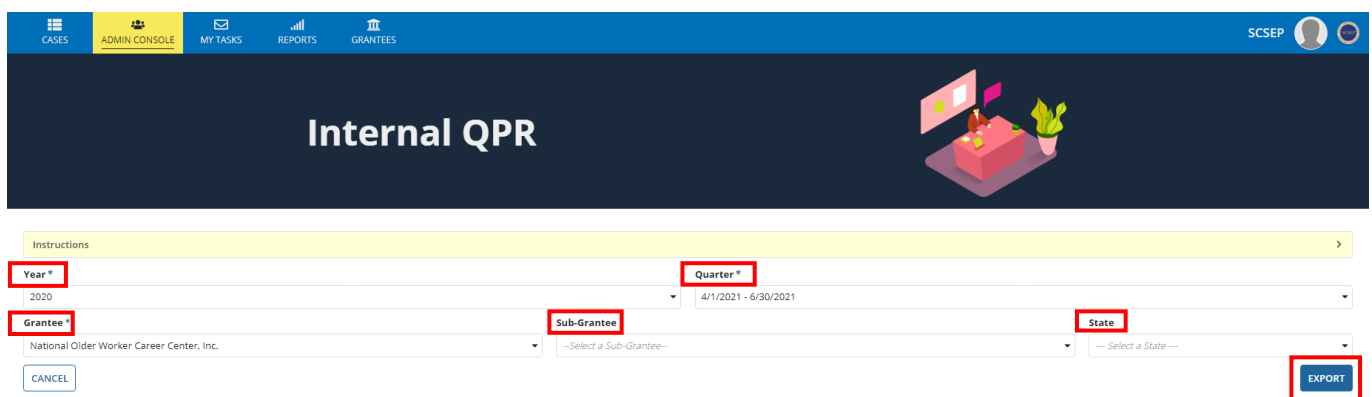
5. Generate Internal QPR Reports

The **Generate Internal QPR Reports** page allows sub-grantee administrators, grantee administrators, Program Analysts, and read-only users to generate an internal Quarterly Progress Report. The following

instructions display below the banner in an expandable note: Please select a reporting quarter/period 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, including the End of Year period (all 4 quarters). 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.



The screenshot shows the 'Internal QPR' form. At the top is a navigation bar with 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS', and 'GRANTEES'. The 'ADMIN CONSOLE' tab is active. Below the navigation bar is a header with 'Internal QPR' and an illustration of a desk with a laptop and a plant. The form itself has a yellow 'Instructions' section. Below it are four dropdown menus: 'Year*' (set to 2020), 'Quarter*' (set to 4/1/2021 - 6/30/2021), 'Grantee*' (set to National Older Worker Career Center, Inc.), and 'Sub-Grantee' (set to --Select a Sub-Grantee--). There is also a 'State' dropdown set to --Select a State--. At the bottom left is a 'CANCEL' button, and at the bottom right is a blue 'EXPORT' button.

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. :

Internal WIPS Report Generation Status

Once your Internal QPR Report is complete, you will receive an email link to download. Please click 'confirm' to return to the Admin Console.

CONFIRM

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.

6. 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.

Paid Hours for the previous program year can be entered or edited from the Program Year drop-down selection.

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

Manage Paid Hours



Required Filters

Grantee *	Sub-Grantee *	Program Year *
--Select a Grantee--	--Select a Sub-Grantee--	-- Select a Program Year --

Optional Filters

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
No items available										

[\(Show Detailed Instructions\)](#)

CLOSE

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

Manage Paid Hours



Required Filters

Grantee *	Sub-Grantee *	Program Year *
National Older Workers Association (NOWA)	NOWA (New Jersey)	2022

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

Required Filters

Grantee *

National Older Workers Association (NOWA)

Sub-Grantee *

NOWA (New Jersey)

Program Year *

2022

Optional Filters

Status

Active

Case Assigned To

Fred Smith

Host Agency

Organization Name

Begin typing to search for an Organization

Participant ID

Participant Name ?

Enrollment

From

01/01/2020

To

01/15/2023

Exit

From

01/01/2020

To

01/15/2023

- 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.
- 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.
- If the **SAVE** button is grayed out and cannot be clicked, click anywhere on the screen to activate it.
- 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	CM5099002144	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.

Paid Hours Configuration

NOTE

Categories of hours not provided by your organization to any participant in the quarter selected. For any category that you check below, 0 hours will be entered for all participants

Category*

☐ PRA Activities
☐ Paid Training (In Person)
☐ Paid Training (Remote)
☐ Paid CSA (In Person)
☐ Paid CSA (Remote)
☐ Paid Sick Leave

Quarter*

Select Quarter

BULK UPDATE

[Reset](#) | [Search](#)

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

Paid Hours Configuration

NOTE

Categories of hours not provided by your organization

Category*

☐ PRA Activities
☐ Paid Training (In Person)
☒ Paid Training (Remote)
☐ Paid CSA (In Person)
☒ Paid CSA (Remote)
☐ Paid Sick Leave

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.

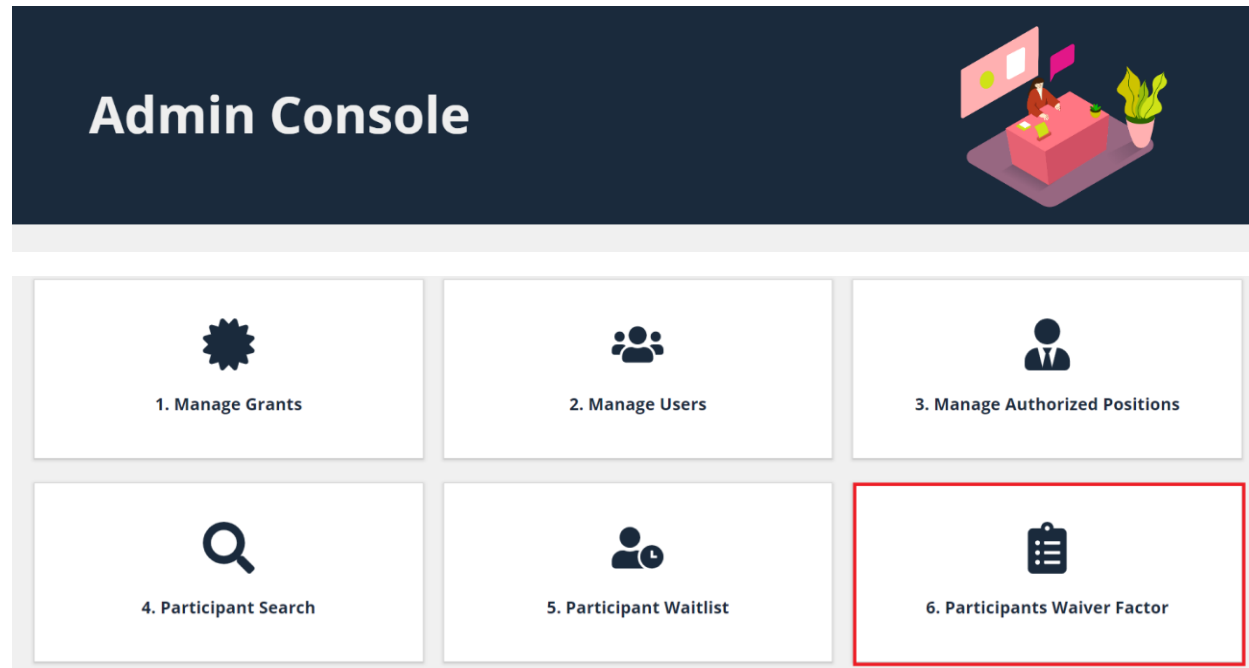
All hours fields for the selected category(s) and quarter will be set to 0.

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	CM5000498091	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	CM5000498088	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

7. 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.

Grantee Selection

Instructions

You have Grant access to Multiple Grantee Organizations. Please select a Grantee Organization to view grants.

User Organizations

Grantee *	Sub-Grantee *
Swap Test #1	Swap Sub #2
<input type="button" value="CANCEL"/>	<input type="button" value="SUBMIT"/>

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.

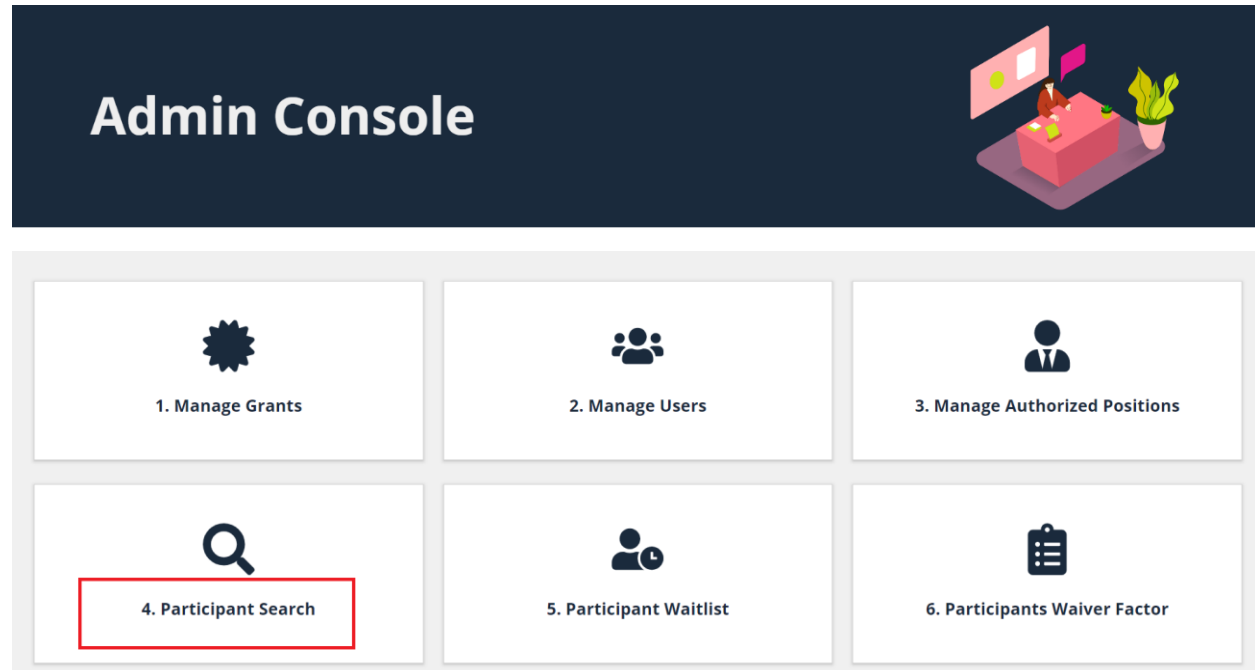
Participant: Jeannie Sims

Waiver Factors for Program Year 2023

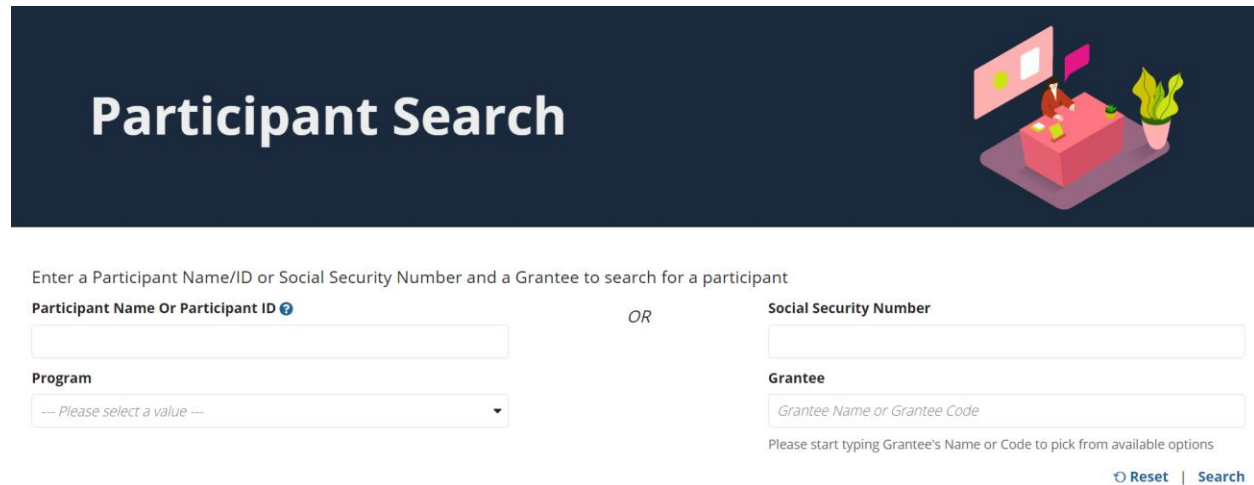
Severe Disability * <input type="radio"/> Yes <input checked="" type="radio"/> No	Last Updated Date * <input type="text" value="10/13/2023"/>
Pract * <input type="radio"/> Yes <input checked="" type="radio"/> No	Last Updated Date * <input type="text" value="10/13/2023"/>
Old Enough but Not Receiving SS Title II * <input type="radio"/> Yes <input checked="" type="radio"/> No	Last Updated Date * <input type="text" value="10/13/2023"/>
Severely Limited Employment Prospects * <input type="radio"/> Yes <input checked="" type="radio"/> No	Last Updated Date * <input type="text" value="10/13/2023"/>
Limited English Proficiency * <input type="radio"/> Yes <input checked="" type="radio"/> No	Last Updated Date * <input type="text" value="10/13/2023"/>

8. Participant Search

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



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



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
<input type="text"/>		<input type="text"/>
Program		Grantee
<input type="text" value="--- Please select a value ---"/>		<input type="text" value="Grantee Name or Grantee Code"/>
		<small>Please start typing Grantee's Name or Code to pick from available options</small>
		Reset | Search


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

Day(s) Left in Program 711

Date of Last Extension Request

Participant ID 10005587

Durational Limit Date 12/30/2024

Eligible to Enroll? No

Date of Birth 01/01/1950

Month(s) in Program 36 months, 20 days

Participant Enrollments

Case ID: 10869116

Grantee National Older Workers Association (NOWA)

Sub-Grantee Name NOWA (New Jersey)

Application Date 1/1/2020

Exit Date None

Status Active

Time In Case 1115

Primary Phone

Alternate Phone

(222) 232-6022 

None

Address 60 Broad Street
Apartment 3A
Somerset, New Jersey 08854

Open Placements

Employer	Date of Placement	
No Open Placement Found		

CLOSE

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.

9. 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.

Participant Waitlist

Participant Name Or Participant ID ?

Grantee

National Older Workers Association (NOWA)

Sub-Grantee

NOWA (California)

[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
No Cases Are Available				

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	Participant ID	Month(s) in Program
Susan Sangria	CM5010005614	0 months, 0 days
Primary Phone	Age	
(222) 222-2222 	73	
Durational Limit Date	Day(s) Left in Program	
	0	

Intake Checklist

Action Items	
Eligibility	
Characteristics	
Other Enrollment	
Program Introduction	

10. 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.

Manage Organization and Contacts

Note

To search for a Organization, select a State from the list and type a city and organization agency name. Then, select Search. *The city field is case sensitive. *The organization name field can take partial or full names.

Filters

State *

Select a State

City *

Organization Name *

[RESET](#)
[SEARCH](#)

[CLOSE](#)

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

10.1 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.

Manage Organization and Contacts

Note

To search for a Organization, select a State from the list and type a city and organization agency name. Then, select Search. *The city field is case sensitive. *The organization name field can take partial or full names.

Filters

State *

Maryland

City *

Baltimore

Organization Name *

Wal

RESET

SEARCH

CLOSE

4. Click **SEARCH**.

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

Manage Organization and Contacts

Note

To search for a Organization, select a State from the list and type a city and organization agency name. Then, select Search. *The city field is case sensitive. *The organization name field can take partial or full names.

Filters

State *

Maryland

City *

Baltimore

Organization Name *

Wal

RESET

SEARCH

ADD

Agency ID	Name	FEIN	Address	Primary Contact
10185429	Walters Art Muse		5 West Mt. Vernon Street, Baltimore, Maryland 21201	Mr. James Gross
10203917	Carruther's Clinic/Walter P. Carter Clinics		827 Linden Ave. Baltimore, Maryland 21201	Ms. Barbara Sadauski
10218219	The Walters Art Museum		600 North Charles Street, Baltimore, Maryland 21213	Ms. Louis Guy

10.2 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.

Manage Organization and Contacts

Note

To search for a Organization, select a State from the list and type a city and organization agency name. Then, select Search. Both city and organization name field can take partial or full names.

Filters

State *

New Jersey

City *

Franklin Park

Organization Name *

Frank

RESET

SEARCH

ADD

Agency ID	Name	FEIN	Address	Primary Contact
10274104	Franklin Park Internet Cafe	123456789	20 Garden Avenue, Franklin Park, New Jersey 08823	Dr. Rachel Haring
10274109	Franklin Park Tech Center	123456789	Franklin Park Technology Center, Franklin Park, New Jersey 08823	Dr. Samuel Johnson

CLOSE

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

Add Organization

Organization Details

Organization Name

CANCEL

ADD

Manage Organization and Contacts

Note

To search for a Organization, select a State from the list and type a city and organization agency name. Then, select Search. Both city and organization name field can take partial or full names.

Filters

State *

New Jersey

City *

Franklin Park

Organization Name *

Frank

RESET

SEARCH

[ADD](#)

Agency ID	Name	FEIN	Address	Primary Contact
10274104	Franklin Park Internet Cafe	123456789	20 Garden Avenue, Franklin Park, New Jersey 08823	Dr. Rachel Haring
10274109	Franklin Park Tech Center	123456789	Franklin Park Technology Center, Franklin Park, New Jersey 08823	Dr. Samuel Johnson

[CLOSE](#)

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

Add Organization

Organization Details

Organization Name

FEIN

Address Line 1 *

Address Line 2

City *

State *

--- Select a Sta...

Zip *

Zip+4

Contact Information

Salutation

Please Select Value

Contact First Name *

Contact Last Name *

Title *

Is Primary POC?

☒ Yes ☐ No

Primary Contact Number

☐ Cell ?

Primary Extension

Alternate Contact Number

☐ Cell ?

Alternate Extension

Fax Number

E-mail

Additional Details

NOTE

Select a grantee and sub grantee to see associated additional details.

Filters

Grantee

--Select a Grantee--

Sub-Grantee

--Select a Sub-Grantee--

[RESET](#)
[SEARCH](#)

Contact Address

☐ Check if Contact Address is different than the Organization Address

[CANCEL](#)
[ADD](#)

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.

▼ Additional Details

NOTE

Select a grantee and sub grantee to see associated additional details.

Filters

Grantee

National Older Workers Associati... ▼

Sub-Grantee

NOWA (New Jersey) ▼

RESET

SEARCH

Agency Type

Organization Continued Availability

No items available

[+ Add New](#)

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

Filters

Grantee

National Older Workers Associati... ▼

Sub-Grantee

NOWA (New Jersey) ▼

RESET

SEARCH

Agency Type	Organization Continued Availability
No items available	
<div>+ Add New</div>	

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

Agency Type	Organization Continued Availability
<div>--- Please select a value --- ▼</div> <div> <div>--- Please select a value ---</div> <div>Host Agency</div> <div>Employer</div> <div>Service Provider</div> </div>	<div> <input type="radio"/> Available <input type="radio"/> Not Available </div> <div>×</div>

☐ Check if Contact Address is different than the Organization Address

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.

Agency Type	Organization Continued Availability
<div>Host Agency ▼</div>	<div> <input type="radio"/> Available <input type="radio"/> Not Available </div> <div>×</div>
<div>+ Add New</div>	

Host Agency Agreement Date

mm/dd/yyyy

📅

Host Agency Monitoring Visit Date

mm/dd/yyyy



📅

Job Codes

--Select at most 3 Job Codes-- ▼

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.

Agency Type	Organization Continued Availability	
Host Agency	<input type="radio"/> Available <input type="radio"/> Not Available	
Employer	<input type="radio"/> Available <input type="radio"/> Not Available	

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.

10.3 Edit an Organization

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

Manage Organization and Contacts

Note >

Filters >

State *

City *

Organization Name *

[RESET](#)
[SEARCH](#)

ADD

Agency ID	Name	FEIN	Address	Primary Contact
10274104	Franklin Park Internet Cafe	123456789	20 Garden Avenue, Franklin Park, New Jersey 08823	Dr. Rachel Haring

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

10.4 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 Information

[ADD](#)
[EDIT](#)

☐ Contact Name

Contact Title

No Contacts Available

Additional contact data entry fields are displayed.

Additional Contact Information

[ADD](#)
[EDIT](#)

~ Add Contact

Salutation

Contact First Name *

Contact Last Name *

Title *

Primary Contact Number

☐ Cell?

Alternate Contact Number

☐ Cell?

Fax Number

E-mail

~ Contact Address

☐ Check if Contact Address is different than the Organization Address

[CANCEL](#)
[SAVE](#)

4. Enter the additional contact's information.

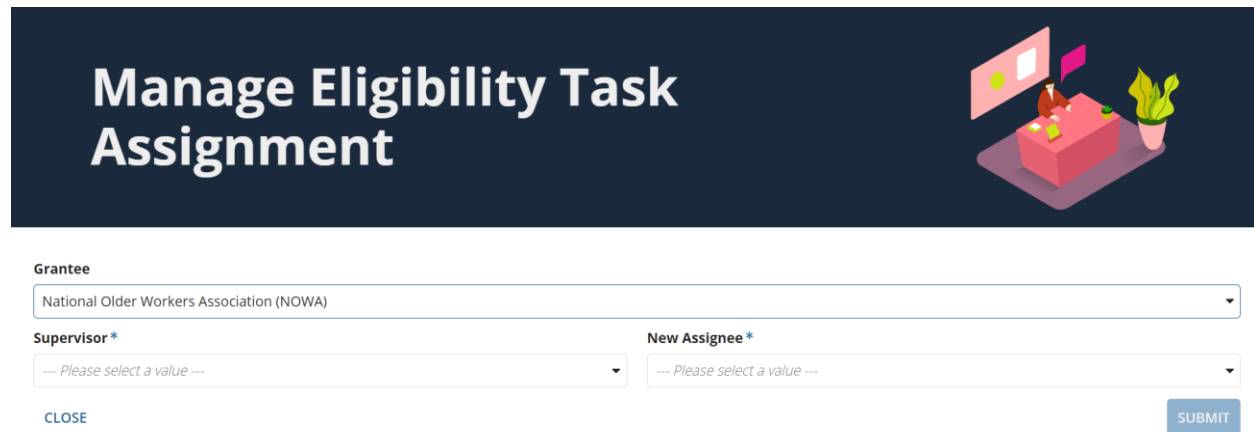
5. Click **SAVE**.

The additional contact is added to the organization.

11. 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 screenshot shows the 'Manage Eligibility Task Assignment' form. At the top, there is a large heading 'Manage Eligibility Task Assignment' next to a decorative illustration of a desk with a laptop, a potted plant, and a small figurine. Below the heading, there are three dropdown menus. The first dropdown is labeled 'Grantee' and has 'National Older Workers Association (NOWA)' selected. Below it, there are two more dropdowns: 'Supervisor*' and 'New Assignee*'. Both of these dropdowns currently show the placeholder text '--- Please select a value ---'. At the bottom left of the form is a 'CLOSE' link, and at the bottom right is a 'SUBMIT' button.

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.

12. Extracts

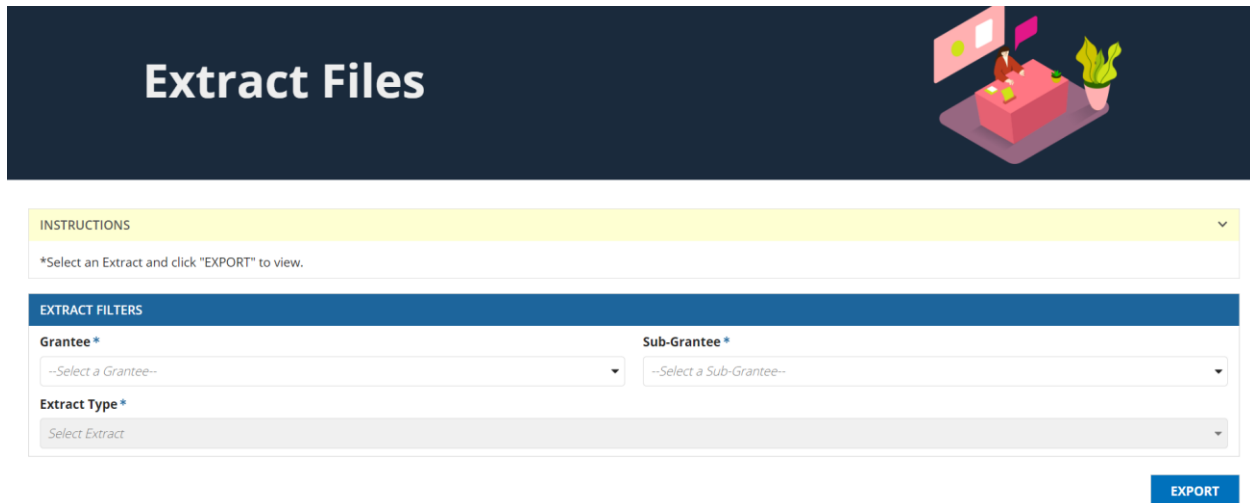
Grantee administrators and program analysts can export extracts from the ADMIN CONSOLE for the grantees to which they are assigned. The extracts available for export are Participant Extract, Waiver Extract and Break Extract.

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

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

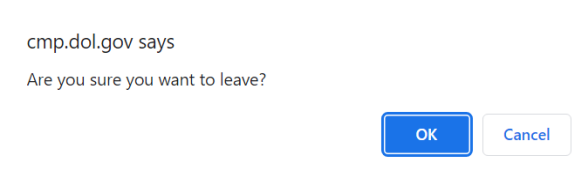
Select the **Grantee**, **Sub-Grantee** and **Extract Type** from the list.

Click the **EXPORT** button.



The screenshot shows the 'Extract Files' page. At the top, there is a dark blue header with the text 'Extract Files' and an illustration of a pink cube with a plant and a screen. Below the header, there is a yellow 'INSTRUCTIONS' box with the text '*Select an Extract and click "EXPORT" to view.' Below this is a blue 'EXTRACT FILTERS' section. It contains three dropdown menus: 'Grantee*' with the placeholder '--Select a Grantee--', 'Sub-Grantee*' with the placeholder '--Select a Sub-Grantee--', and 'Extract Type*' with the placeholder 'Select Extract'. To the right of these filters is a blue 'EXPORT' button.

A confirmation dialog box is displayed.



The screenshot shows a confirmation dialog box. It has a title bar that says 'cmp.dol.gov says'. The main text inside the box says 'Are you sure you want to leave?'. At the bottom right of the box are two buttons: a blue 'OK' button and a white 'Cancel' button with a blue border.

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.

Download Participant Extract

Participant Extract Extract data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
(Last Refresh: 7/13/2023 12:20 PM EDT)

REFRESH

CLOSE

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

Download Participant Extract

Export File Grantee ID 9002534 - Participant Extract

CLOSE

Click the linked file name.

The file is downloaded in .csv format.


13. 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.

Generate Nationwide QPR



Instructions

Year *

2023

Quarter *

7/1/2023 - 9/30/2023

CANCEL

EXPORT

Select a Year and Quarter (or End of Year period) from the lists.

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

Nationwide WIPS Report Generation Status

Once your Nationwide QPR Report is complete, you will receive an email link to download. Please click 'confirm' to return to the Admin Console.

CONFIRM

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



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

To



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		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. Access to reports is dependent on user role (a full list by user role is presented below).

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

Reports
USER ORGANIZATIONS
EQUITABLE DISTRIBUTION

NOTE

Select a Grantee and Sub-Grantee and then click the search button to access the list of reports. If no Sub-Grantee is selected, the report will reflect data for all Sub-Grantees within the selected Grantee.

USER ORGANIZATION FILTERS

Nationwide

☐ Yes
☒ No

Grantee *

--Select a Grantee--

Sub-Grantee *

--Select a Sub-Grantee--

SEARCH

This section contains 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 generate data for all the Sub-Grantees within the selected Grantee)
- Click **Search**

(Preprod/UAT) United States Dep
Reports - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other boof

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES
SCSEP

Reports
USER ORGANIZATIONS
EQUITABLE DISTRIBUTION

NOTE

Select a Grantee and Sub-Grantee and then click the search button to access the list of reports. If no Sub-Grantee is selected, the report will reflect data for all Sub-Grantees within the selected Grantee.

USER ORGANIZATION FILTERS

Nationwide

☐ Yes
☒ No

Grantee *

New Mexico

Sub-Grantee

SCSEP - New Mexico

SEARCH

Depending on your User Role you will see reports categorized under **PARTICIPANTS**, **ACTIONS**, and **EMPLOYERS**.

User Role Report Access

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*.

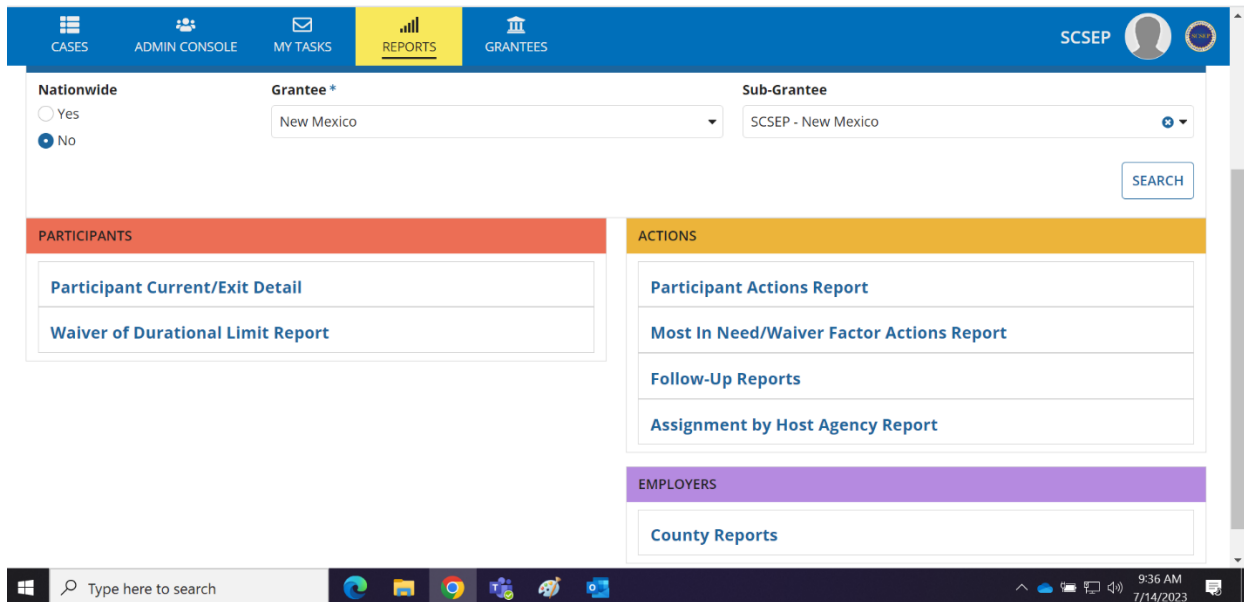
4. **Grantee Admin:** As above, for case Manager, **plus** these additional.

- 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.



The screenshot displays the SCSEP Reports interface. At the top, there is a navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. Below the navigation bar, there are filters for Nationwide (Yes/No), Grantee (New Mexico), and Sub-Grantee (SCSEP - New Mexico). A SEARCH button is located to the right of the Sub-Grantee filter. The main content area is divided into three sections: PARTICIPANTS (orange header), ACTIONS (yellow header), and EMPLOYERS (purple header). The PARTICIPANTS section lists 'Participant Current/Exit Detail' and 'Waiver of Durational Limit Report'. The ACTIONS section lists 'Participant Actions Report', 'Most In Need/Waiver Factor Actions Report', 'Follow-Up Reports', and 'Assignment by Host Agency Report'. The EMPLOYERS section lists 'County Reports'. The Windows taskbar at the bottom shows the time as 9:36 AM on 7/14/2023.

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

To select a report, click on the report name. To get back to the list of reports on the first screen of an individual report, click on the link that says ← Back.

CASES


ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP



≡ Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

← Back

Participant Current/Exit Detail

Filters

Active Filters for Enrollments ?

Select a status filter type

Active Filters for Assignments *

Select a status filter type

Initial Assignment Date From

mm/dd/yyyy

Initial Assignment Date To

mm/dd/yyyy

Exit Date From

mm/dd/yyyy

Exit Date To

mm/dd/yyyy

RESET

SEARCH

≡ Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

NOTE

Select a Grantee and Sub-Grantee and then click the search button to access the list of reports. If no Sub-Grantee is selected, the report will reflect data for all Sub-Grantees within the selected Grantee.

USER ORGANIZATION FILTERS

Nationwide

Grantee *

Sub-Grantee

☐ Yes
 ☒ No

SEARCH

1.1 Participant Current/Exit Detail

CASES


ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP



≡ Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

← Back

Participant Current/Exit Detail

Filters

Active Filters for Enrollments ?

Select a status filter type

Active Filters for Assignments *

Select a status filter type

Initial Assignment Date From

mm/dd/yyyy

Initial Assignment Date To

mm/dd/yyyy

Exit Date From

mm/dd/yyyy

Exit Date To

mm/dd/yyyy

RESET

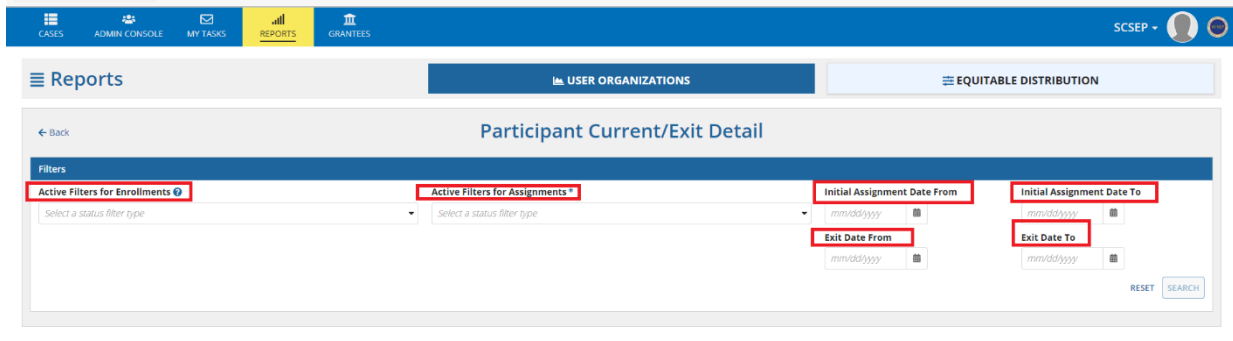
SEARCH

This report can be filtered by the following

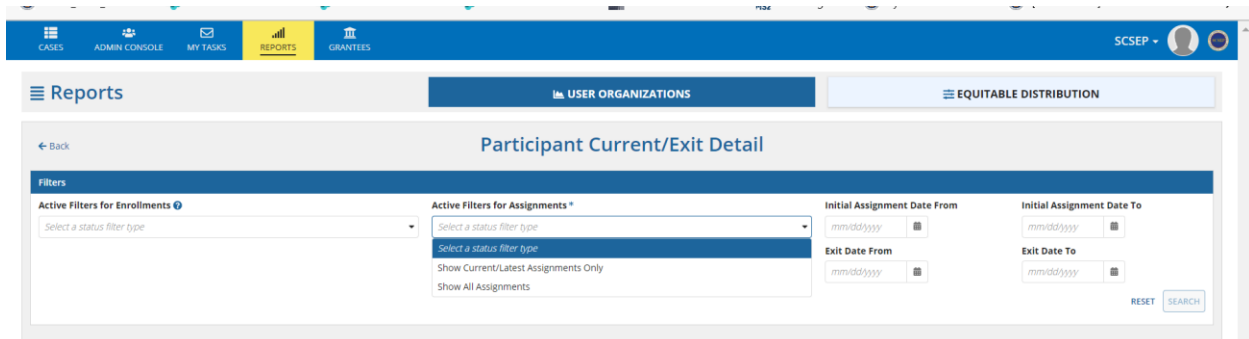
- **Active Filters for Enrollments:** There are two choices. Show Currently Active Enrollments Only or Show Exited Enrollments Only.
- **Active Filters for Assignment:** There are two choices. Show Current/Latest Assignments Only or Show All Assignments.

- **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.

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

Back

Participant Current/Exit Detail

Active Filters for Enrollments

Select a status filter type

Active Filters for Assignments

Show Current/Latest Assignments Only

Initial Assignment Date From

mm/dd/yyyy

Initial Assignment Date To

mm/dd/yyyy

Exit Date From

mm/dd/yyyy

Exit Date To

mm/dd/yyyy

REFRESH

SEARCH

Results Summary

Number of Current Participants:

288

Average Time in Program:

620 Days

Average Time in (District of Columbia):

620.08 Days

Number of Participants with More Than One Displayed Enrollment:

29

Average Number of Enrollments Per Participant:

1.05

Average Days in Displayed Enrollments:

520.51

Average Number of Displayed Assignments Per Enrollments:

1

Average Days in Current Assignments:

495

Average Days in Displayed Assignments:

495

Number of Exited Participants:

314

Percentage Exiting for Employment:

41.08%

Percentage Exiting for Other Reason:

10.19%

Percent Excluded at Exit:

4.14%

Number of Participants Ever on Leave of Absence:

114

Average Number of Leaves of Absence Per Enrollment:

1.25

Average Days Ever on Leave of Absence:

28.11

EXPORT

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	708333123	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		4/9/2022	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

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

Results Summary

Number of Current Participants:

288

Average Time in Program:

620 Days

Average Time in (District of Columbia):

620.08 Days

Number of Participants with More Than One Displayed Enrollment:

29

Average Number of Enrollments Per Participant:

1.05

Average Days in Displayed Enrollments:

520.51

Average Number of Displayed Assignments Per Enrollments:

1

Average Days in Current Assignments:

495

Average Days in Displayed Assignments:

495

Number of Exited Participants:

314

Percentage Exiting for Employment:

41.08%

Percentage Exiting for Other Reason:

10.19%

Percent Excluded at Exit:

4.14%

Number of Participants Ever on Leave of Absence:

114

Average Number of Leaves of Absence Per Enrollment:

1.25

Average Days Ever on Leave of Absence:

28.11

EXPORT

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

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

SCSEP +

Download Participant Current/Exited Report Summary Details

Participant Current/Exited Report Summary details data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
(Last Refresh: 9/21/2022 8:05 AM 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.

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

SCSEP +

Download Participant Current/Exited Report Summary Details

Export File Grantee ID 99000148 - Participant Cur Ext Report Summary Details

CLOSE

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

Number of Current Participants					
	A	B	C	D	E
1	Number of Current Participants	Average Time in Program	Average Time in Grantee	Number of Participants with More Than 1 Enrollment	Average Number of Enrollments Per Participant
2	288	620	620.08	29	1.05
3					
4					
5					
6					
7					
8					

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

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).

Results Details

	Case ID	Participant Name	Contact Number	Initial Assignment Date	Exit Date	Status
	10365478	Torey Clark	5053604322	4/1/2022		Active

<< < 101 - 110 of 187 > >>

EXPORT

Participant Assignment Details (Name: Torey Clark)

Assignment ID: 11837522

Time In Program 470 Days	Job Interest Code 1 Community and Social Service Occupations	Host Agency City of Aztec	Exit Date N/A
Enrollment Date 4/1/2022	Job Interest Code 2 Food Preparation and Serving Related Occupations	Host Agency Address 201 W. Chaco, Aztec, New Mexico 87410	Exit for Unsubsidized Employment N/A
County of Residence San Juan County	Job Interest Code 3 Office and Administrative Support Occupations	Host Agency Contact Ms. Maya Pierce	Subsequently Employed N/A
Case Manager Mary Smith	Assignment Date 4/1/2022	Host Agency Supervisor Name	Other Exit Reason N/A
Days in Enrollment 470		Host Agency Supervisor Phone Number	

Days Ever on Leave of Absence 0	Assignment Start Date 4/4/2022	Host Agency Supervisor Email
Days in Most Recent Leave of Absence 0	Assignment End Date	
Number of Days on Current Break N/A	Days in Assignment 470	






EXPORT


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

Days Ever on Leave of Absence 0	Assignment Start Date 4/4/2022	Host Agency Supervisor Email
Days in Most Recent Leave of Absence 0	Assignment End Date	
Number of Days on Current Break N/A	Days in Assignment 470	

EXPORT

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

 CASES
  ADMIN CONSOLE
  MY TASKS
  **REPORTS**
 GRANTEES

SCSEP 


Download Participant Current/Exited Report Assignment Details

Participant Current/Exited Report Assignment details data is being exported. Click refresh until the file is ready to download.

Export File

Exporting...

(Last Refresh: 9/21/2022 8:17 AM EDT)



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.

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP

Download Participant Current/Exited Report Assignment Details

Export File

Case ID 99003312 - Participant Cur Ext Report Assignment 99002439 Details

CLOSE

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.

(Preprod/UAT) United States Dep

Participant Cur Ext Status - SCSEP

← → ↻

cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/fYB9cjQEjBAMESITUdTIOL02II1F8omiLqW0KmU3FCxOMdhwk87A?parameters=a7...

☆

⚙

👤

⋮

Other bookmarks

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP

Download Participant Current/Exited Report Summary Details

Participant Current/Exited Report Summary details data is being exported. Click refresh until the file is ready to download.

Export File

Exporting...
(Last Refresh: 12/1/2022 1:52 PM EST)

REFRESH

CLOSE

Durational Limit E...xlsx

Case ID 10365465...xlsx

Grantee ID 59 - Pa...xlsx

Show all

Type here to search

1:53 PM

12/1/2022

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

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

NOTE

Select a Grantee and Sub-Grantee and then click the search button to access the list of reports. If no Sub-Grantee is selected, the report will reflect data for all Sub-Grantees within the selected Grantee.

USER ORGANIZATION FILTERS

Nationwide

- ☐ Yes
☒ No

Grantee*

--Select a Grantee--

Sub-Grantee

--Select a Sub-Grantee--

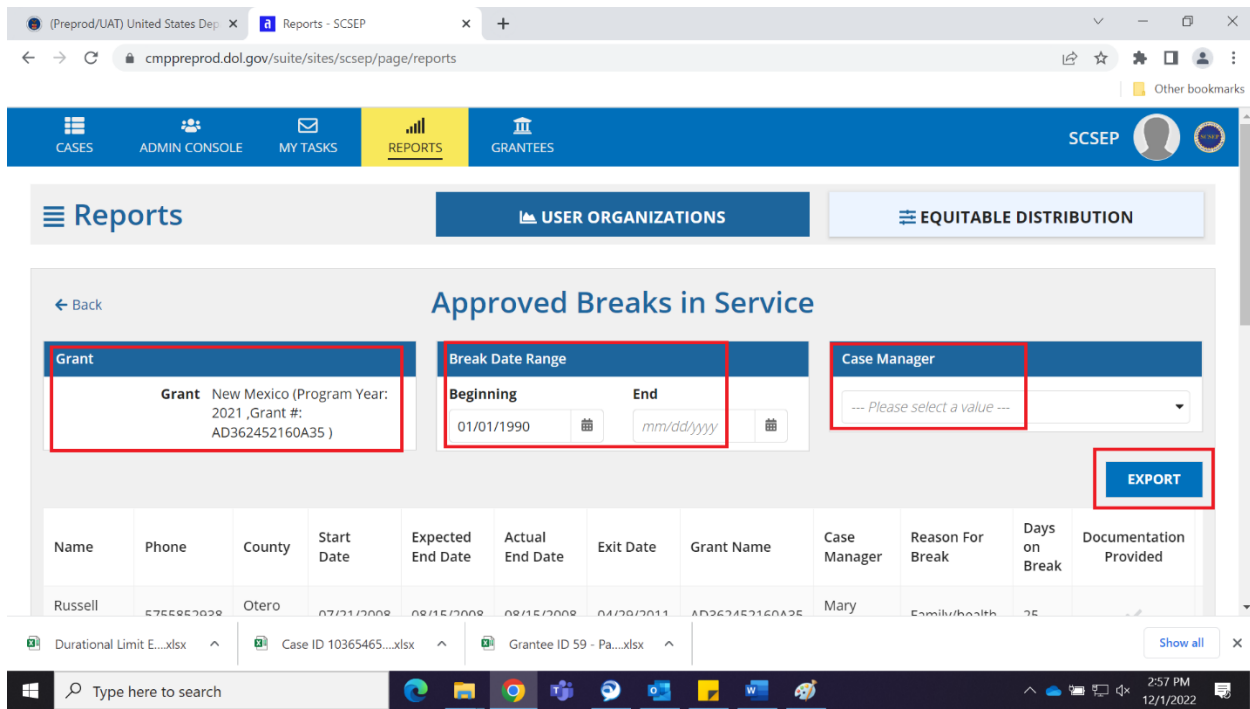
After pressing the CLOSE button (see above example), you are brought back to the first Reports screen and must select Nationwide, Grantee, and Sub-Grantee again.

SEARCH

Durational Limit E...xlsx Case ID 10365465...xlsx Grantee ID 59 - Pa...xlsx

Show all X

1.2 Approved Breaks in Service



The screenshot shows the SCSEP Reports interface. The 'Approved Breaks in Service' report is displayed with the following filters:

- Grant:** New Mexico (Program Year: 2021 ,Grant #: AD362452160A35)
- Break Date Range:** Beginning: 01/01/1990, End: mm/dd/yyyy
- Case Manager:** --- Please select a value ---

An **EXPORT** button is located to the right of the filters. Below the filters is a table with the following columns:

Name	Phone	County	Start Date	Expected End Date	Actual End Date	Exit Date	Grant Name	Case Manager	Reason For Break	Days on Break	Documentation Provided
Russell	5755957039	Otero	07/31/2008	08/15/2008	08/15/2008	04/26/2011	AD362452160A35	Mary	Family/health	25	

The Windows taskbar at the bottom shows the date and time as 2:57 PM 12/1/2022.

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.

(Preprod/UAT) United States Dep: x Reports - SCSEP x +

cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other bookmarks

SCSEP

Name	Phone	County	Start Date	Expected End Date	Actual End Date	Exit Date	Grant Name	Case Manager	Reason For Break	Days on Break	Documentation Provided	Break Active
SCSEP-1976 Retest-001	2222222222	Cape May County	05/01/2022	05/10/2022	07/31/2022		AD362452160A35	fkcm01 fkcm01	Family/health	91	✓	✓
SCSEP-1976 Retest-001	2222222222	Cape May County	08/05/2022	08/14/2022	08/29/2022		AD362452160A35	fkcm01 fkcm01	Family/health	24	✓	✓
SCSEP-1976 Retest-002	2222222222	Cape May County	05/01/2022	05/10/2022	07/31/2022		AD362452160A35	fkcm01 fkcm01	Family/health	91	✓	✓
SCSEP-1976 Retest-002	2222222222	Cape May County	08/04/2022	08/14/2022	08/29/2022		AD362452160A35	fkcm01 fkcm01	Family/health	25	✓	✓

Durational Limit E...xlsx Case ID 10365465...xlsx Grantee ID 59 - Pa...xlsx Show all x

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

(Preprod/UAT) United States Dep: x Reports - SCSEP x +

cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other bookmarks

SCSEP

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

Approved Breaks in Service

Grant: New Mexico (Program Year: 2021 ,Grant #: AD362452160A35)

Break Date Range: Beginning: 01/01/1990 End: mm/dd/yyyy

Case Manager: fkcm01 fkcm01

EXPORT

Name	Phone	County	Start Date	Expected End Date	Actual End Date	Exit Date	Grant Name	Case Manager	Reason For Break	Days on Break	Documentation Provided
SCSEP-1976 Retest-008	2222222222	Essex County	05/06/2022		05/10/2022		AD362452160A35	fkcm01 fkcm01	Family/health	4	✓

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

(Preprod/UAT) United States Dep x Report Summary Confirmation - x


cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQEjBAMESITYZSYWLO0uhr4XrbdtcM_IHW-S3jYtC0D1ymQ?parameters=fe67...

Other bookmarks

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Report Confirmation

Approved Breaks In Service

Name	Size	Generated By	Generated Date	Download
Approved Breaks in Service 12-01-2022 03_01_26	3.459 KB	Fred Keische	12/1/2022 3:01 PM EST	

CLOSE

Durational Limit E...xlsx Case ID 10365465...xlsx Grantee ID 59 - Pa...xlsx Show all

Type here to search 3:01 PM 12/1/2022

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.

AutoSave ON Approved Breaks in Service 12-01-2022 03_01_26 Search (Alt+Q) Kiesche, Frederick P - ETA CTR

File Home Insert Page Layout Formulas Data Review View Help Comments Share

Clipboard Font Alignment Number Styles Cells Editing Sensitivity

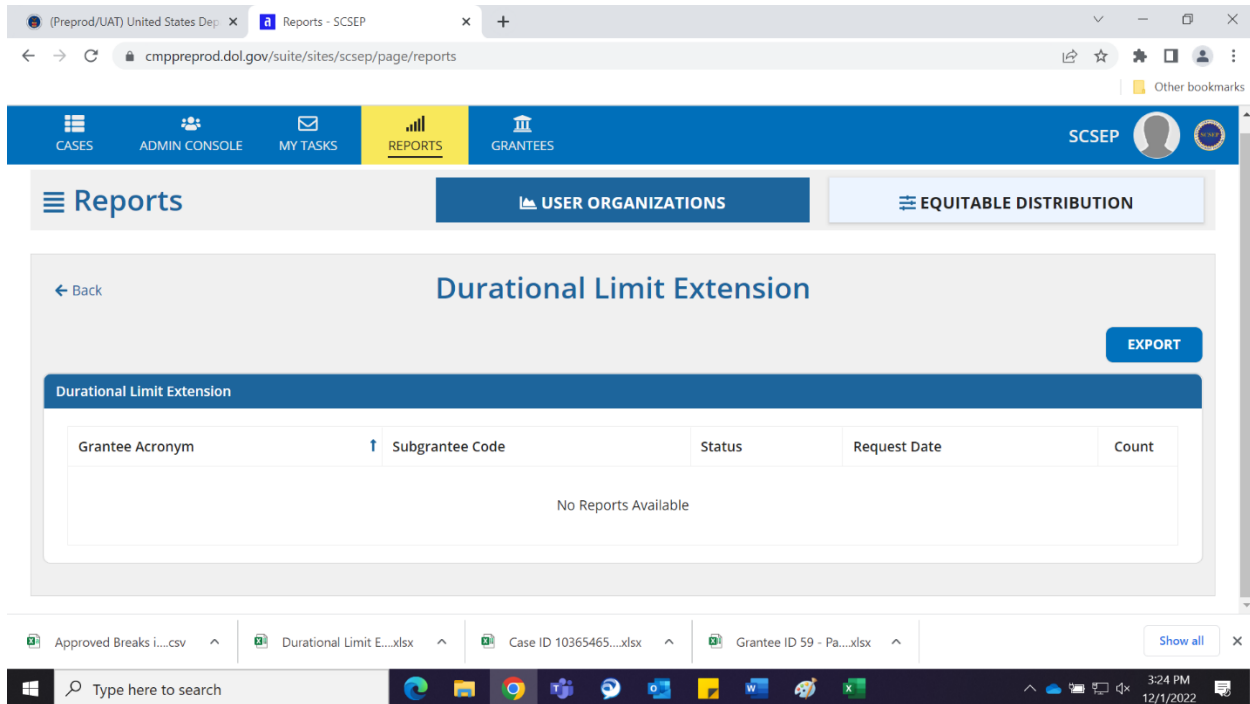
	A	B	C	D	E	F	G	H	I	J	K	L
	GRANTEE	SUB_GRA	LAST_NAM	FIRST_NAME	PARTICIPA	HOME_PHONE	BREAK_START_DATE	BREAK_EXPECTED_END_DATE	BREAK_END_DATE	BREAK_REASON	DAYS_ON_APPROVED_BREAK	APPLICATI
1	690 NM001	Retest-001	SCSEP-1976	10003884	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
2	690 NM001	Retest-001	SCSEP-1976	10003884	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022	
3	690 NM001	Retest-002	SCSEP-1976	10003885	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
4	690 NM001	Retest-002	SCSEP-1976	10003885	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	1/1/2022	
5	690 NM001	Retest-003	SCSEP-1976	10003887	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
6	690 NM001	Retest-003	SCSEP-1976	10003887	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022	
7	690 NM001	Retest-004	SCSEP-1976	10003893	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
8	690 NM001	Retest-004	SCSEP-1976	10003893	2222222222	8/4/2022	8/14/2022		Family/health	120	1/1/2022	
9	690 NM001	Retest-006	SCSEP-1976	10004228	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
10	690 NM001	Retest-006	SCSEP-1976	10004228	2222222222	8/5/2022	8/14/2022		Family/health	119	1/1/2022	
11	690 NM001	Retest-009	SCSEP-1976	10004532	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022	
12	690 NM001	Retest-009	SCSEP-1976	10004532	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	1/1/2022	
13	690 NM001	Retest-011	SCSEP-1976	10004839	2222222222	7/24/2021	9/5/2021	4/8/2022	Family/health	258	1/1/2022	
14	690 NM001	Retest-011	SCSEP-1976	10004839	2222222222	4/9/2022	4/13/2022	9/25/2022	Family/health	169	1/1/2022	
15	690 NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/6/2022	5/10/2022	5/10/2022	Family/health	4	3/3/2022	
16	690 NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/1/2022	5/5/2022	5/5/2022	Family/health	4	3/3/2022	
17	690 NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/1/2022	5/5/2022	5/5/2022	Family/health	4	3/3/2022	
18												
19												
20												
21												
22												

Approved Breaks in Service 12-0

Ready Accessibility: Unavailable 3:03 PM 12/1/2022

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



← Back

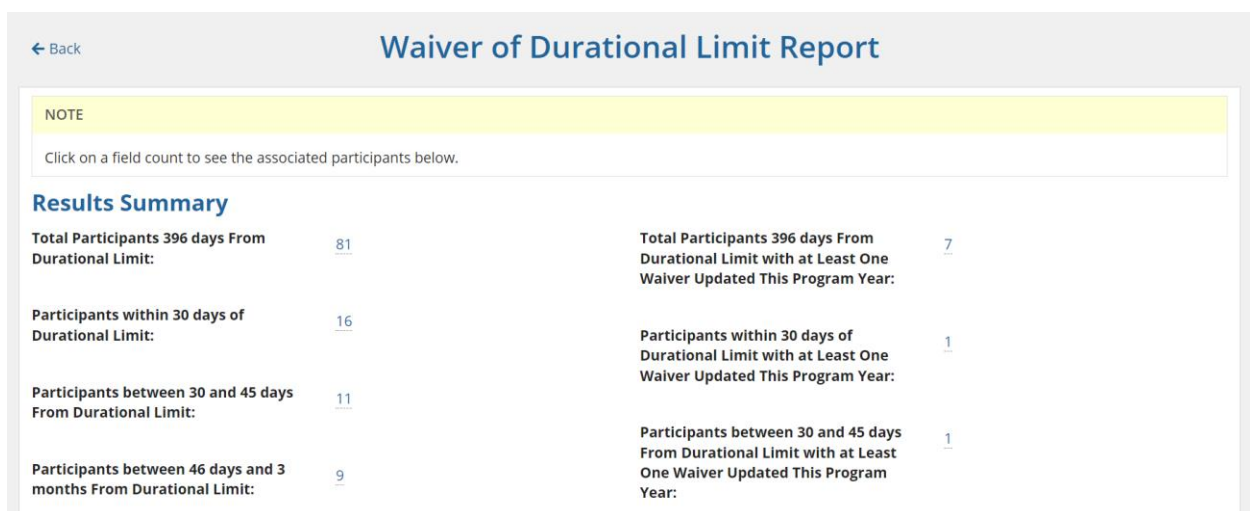
Durational Limit Extension

EXPORT

Grantee Acronym	Subgrantee Code	Status	Request Date	Count
No Reports Available				

Approved Breaks i....csv Durational Limit E....xlsx Case ID 10365465....xlsx Grantee ID 59 - Pa....xlsx Show all

1.4 Waiver of Durational Limit Report



← Back

Waiver of Durational Limit Report

NOTE

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

Results Summary

Total Participants 396 days From Durational Limit:	81	Total Participants 396 days From Durational Limit with at Least One Waiver Updated This Program Year:	7
Participants within 30 days of Durational Limit:	16	Participants within 30 days of Durational Limit with at Least One Waiver Updated This Program Year:	1
Participants between 30 and 45 days From Durational Limit:	11	Participants between 30 and 45 days From Durational Limit with at Least One Waiver Updated This Program Year:	1
Participants between 46 days and 3 months From Durational Limit:	9		

Participants between 3 and 6 months From Durational Limit:	11	Participants between 46 days and 3 months From Durational Limit with at Least One Waiver Updated This Program Year:	0
Participants between 6 and 9 months From Durational Limit:	13	Participants between 3 and 6 months From Durational Limit with at Least One Waiver Updated This Program Year:	0
Participants between 9 and 13 months From Durational Limit:	21	Participants between 6 and 9 months From Durational Limit with at Least One Waiver Updated This Program Year:	3
Participants 1 Quarter From Durational Limit:	11	Participants between 9 and 13 months From Durational Limit with at Least One Waiver Updated This Program Year:	2
Participants 2 Quarters From Durational Limit:	11	Participants 1 Quarter From Durational Limit with at Least One Waiver Updated This Program Year:	0
Participants 3 Quarters From Durational Limit:	13	Participants 2 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	1
Participants 4 Quarters From Durational Limit:	12	Participants 3 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	3
		Participants 4 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	1

EXPORT

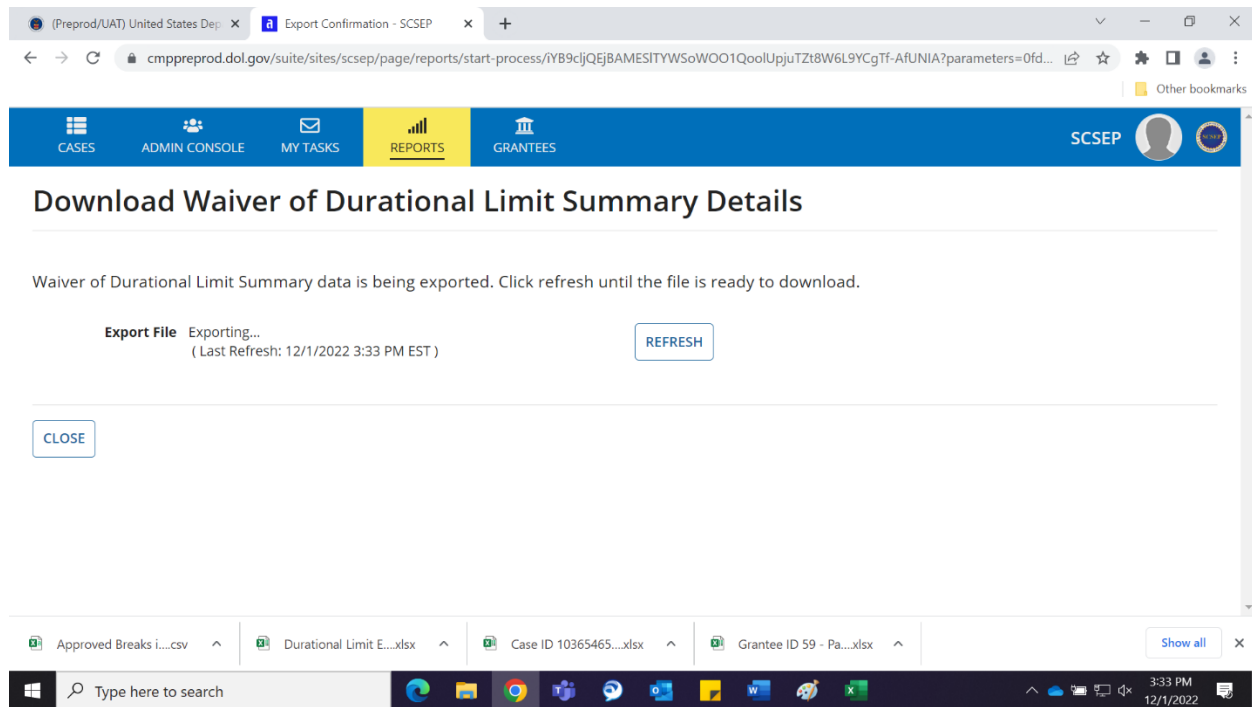
This report is generated based on the combination of Grantee and Sub-Grantee that you selected. For each category (for example Participants 1 Quarter From Durational Limit) you'll see a number (field count). Clicking on that number will display the details for those Participants matching the limit you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

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

Participants 4 Quarters From Durational Limit:	12	Participants 1 Quarter From Durational Limit with at Least One Waiver Updated This Program Year:	0
		Participants 2 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	1
		Participants 3 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	3
		Participants 4 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	1

EXPORT

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



(Preprod/UAT) United States Dep... Export Confirmation - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/iYB9cjQEjBAMESITYWSoWOO1QoolUpjuTZt8W6L9YCgTf-AfUNIA?parameters=0fd...

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Waiver of Durational Limit Summary Details

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

Export File Exporting...
(Last Refresh: 12/1/2022 3:33 PM EST)

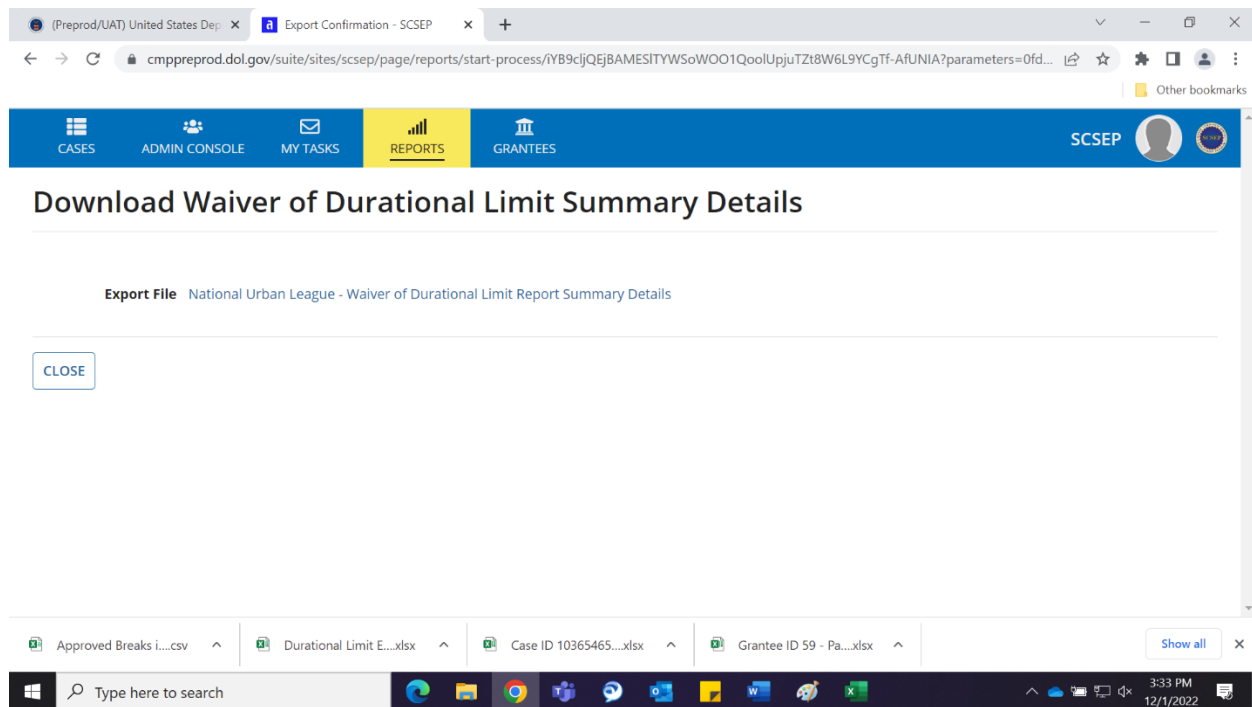
REFRESH

CLOSE

Approved Breaks i....csv Durational Limit E....xlsx Case ID 10365465....xlsx Grantee ID 59 - Pa....xlsx Show all

Type here to search 3:33 PM 12/1/2022

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



(Preprod/UAT) United States Dep... Export Confirmation - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/iYB9cjQEjBAMESITYWSoWOO1QoolUpjuTZt8W6L9YCgTf-AfUNIA?parameters=0fd...

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Waiver of Durational Limit Summary Details

Export File National Urban League - Waiver of Durational Limit Report Summary Details

CLOSE

Approved Breaks i....csv Durational Limit E....xlsx Case ID 10365465....xlsx Grantee ID 59 - Pa....xlsx Show all

Type here to search 3:33 PM 12/1/2022

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

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

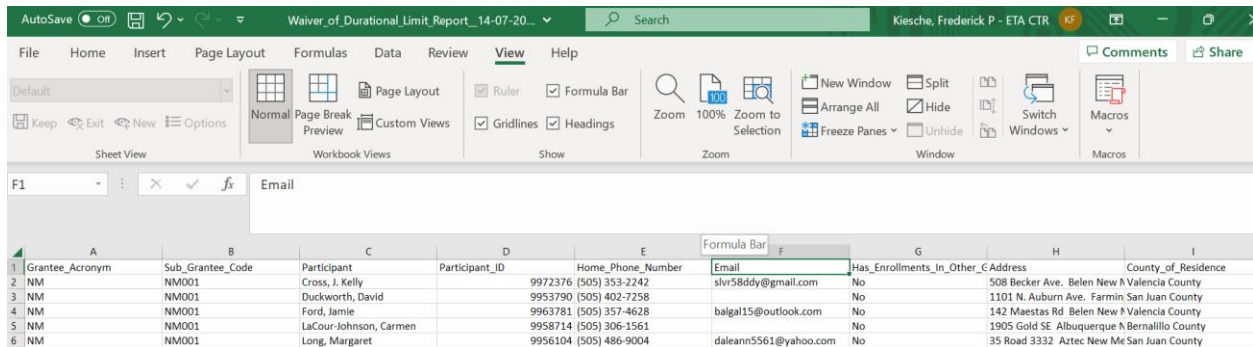
Click on the file name or right click on the file name to download a copy of the file to your default file location.

Download Waiver of Durational Limit Participant Details

Export File Waiver_of_Durational_Limit_Report_14-07-2023

CLOSE

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



Grantee_Acronym	Sub_Grantee_Code	Participant	Participant_ID	Home_Phone_Number	Email	Has_Enrollments_In_Other_Grantees	Address	County_of_Residence
1 NM	NM001	Cross, I. Kelly	9972376	(505) 353-2242	slvr58ddy@gmail.com	No	508 Becker Ave. Belen New Mexico 87002	Valencia County
2 NM	NM001	Duckworth, David	9953790	(505) 402-7258	slvr58ddy@gmail.com	No	1101 N. Auburn Ave. Farmington, NM 87401	San Juan County
3 NM	NM001	Ford, Jamie	9963781	(505) 357-4628	balgal15@outlook.com	No	142 Maestas Rd. Belen New Mexico 87002	Valencia County
4 NM	NM001	LaCour-Johnson, Carmen	9958714	(505) 306-1561	daleann5561@yahoo.com	No	1905 Gold SE Albuquerque NM 87102	Bernalillo County
5 NM	NM001	Long, Margaret	9956104	(505) 486-9004	daleann5561@yahoo.com	No	35 Road 3332 Aztec New Mexico 87604	San Juan County

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

Participant Details		Waiver Factors	
Case Assigned To Smith, Mary	Race, American Indian or Alaskan Native Participant did not self-identify	Severe Disability	Limited English Proficiency
Age 70	Race, Asian Participant did not self-identify	Frail	Low Literacy Skills
Date of Birth 12/26/1952	Race, Black, African American Participant did not self-identify	Old Enough, Not Receiving SS Title II	75 or Older No
Gender Male	Race, Native Hawaiian/Pacific Islander Participant did not self-identify	Severely Ltd Emp Prospects	Formerly Incarcerated
Address 508 Becker Ave. Belen New Mexico 87002	Race, White Yes		
Email slvr58ddy@gmail.com	Ethnicity: Hispanic, Latino, or Spanish Origin? No		
Disability No	Has Enrollments In Other Grantees None		
Veteran Status No			

EXPORT

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

Email slvr58ddy@gmail.com	Yes
Disability No	Ethnicity: Hispanic, Latino, or Spanish Origin? No
Veteran Status No	Has Enrollments In Other Grantees None

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 2:51 PM EDT)

REFRESH

CLOSE

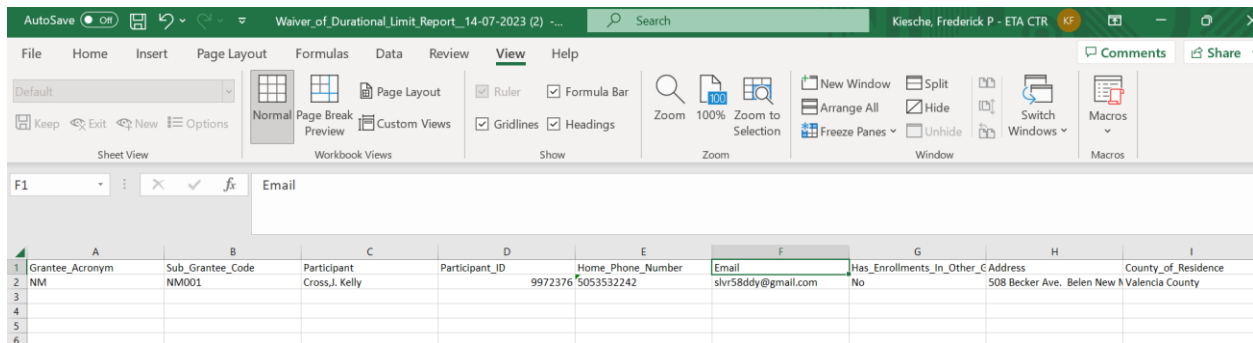
Click on the file name or right click on the file name to download a copy of the file to your default file location.

Download Waiver of Durational Limit Participant Details

Export File Waiver_of_Durational_Limit_Report__14-07-2023

CLOSE

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

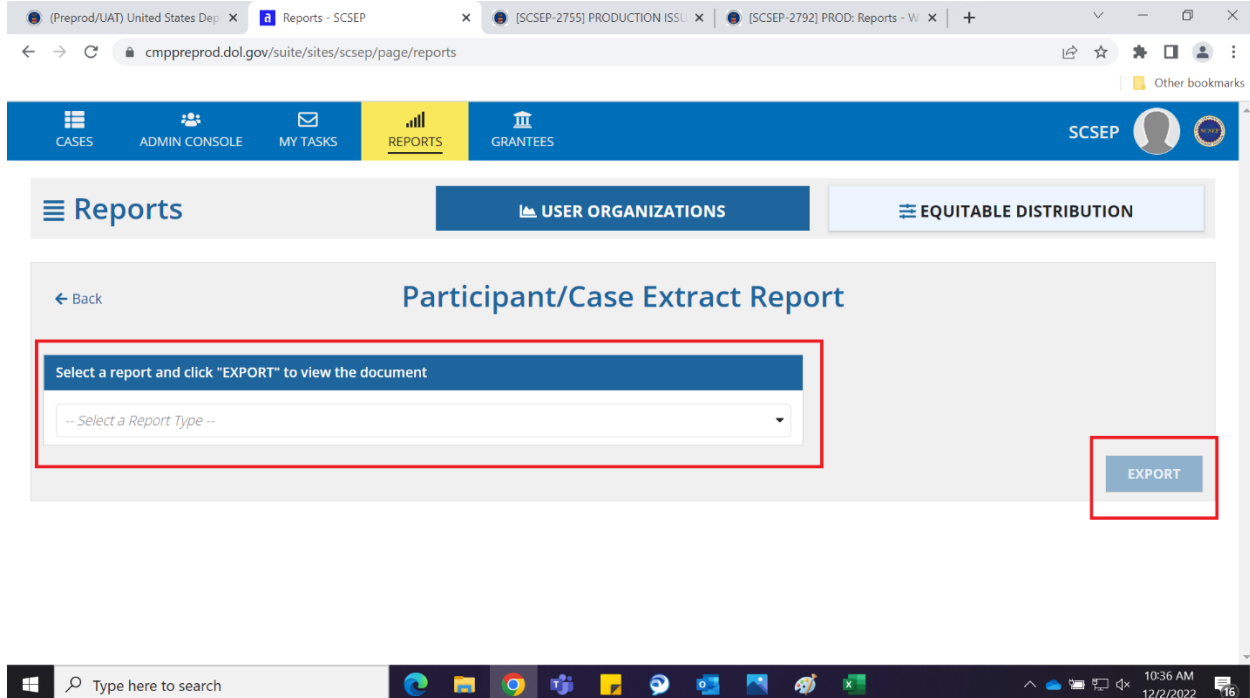


Grantee_Acronym	Sub_Grantee_Code	Participant	Participant_ID	Home_Phone_Number	Email	Has_Enrollments_In_Other	Address	County_of_Residence
NM	NM001	Cross,J. Kelly	9972376	5053532242	slvr58ddy@gmail.com	No	508 Becker Ave. Belen New	Valencia County

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

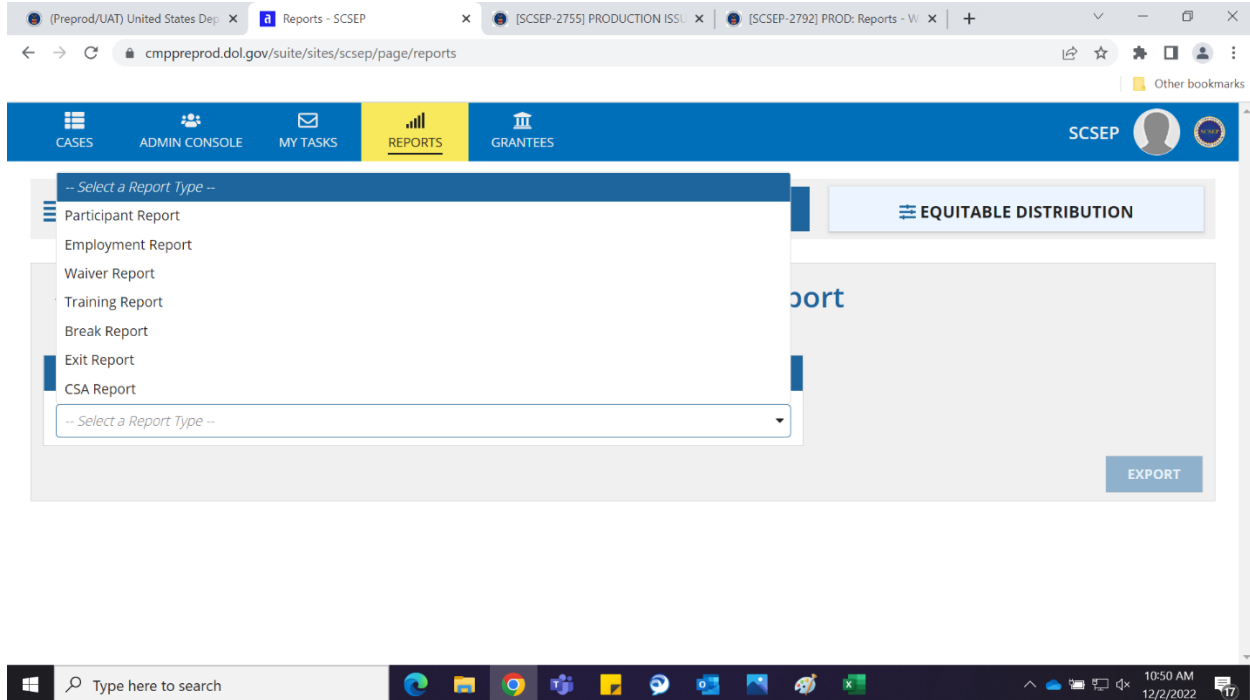


The screenshot shows a web browser window with multiple tabs. The active tab is "Reports - SCSEP" with the URL "cmppreprod.dol.gov/suite/sites/scsep/page/reports". The page has a blue header with navigation links: CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. A user profile icon labeled "SCSEP" is in the top right. Below the header, there are two main sections: "Reports" (with a hamburger menu icon) and "USER ORGANIZATIONS" (with a building icon). To the right of "USER ORGANIZATIONS" is a button labeled "EQUITABLE DISTRIBUTION". The main content area is titled "Participant/Case Extract Report" with a "Back" link. Below the title is a blue box with the text "Select a report and click 'EXPORT' to view the document". Underneath this is a dropdown menu with the text "-- Select a Report Type --". To the right of the dropdown is a blue button labeled "EXPORT". The Windows taskbar is visible at the bottom, showing the search bar and various application icons. The system clock indicates 10:36 AM on 12/2/2022.

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

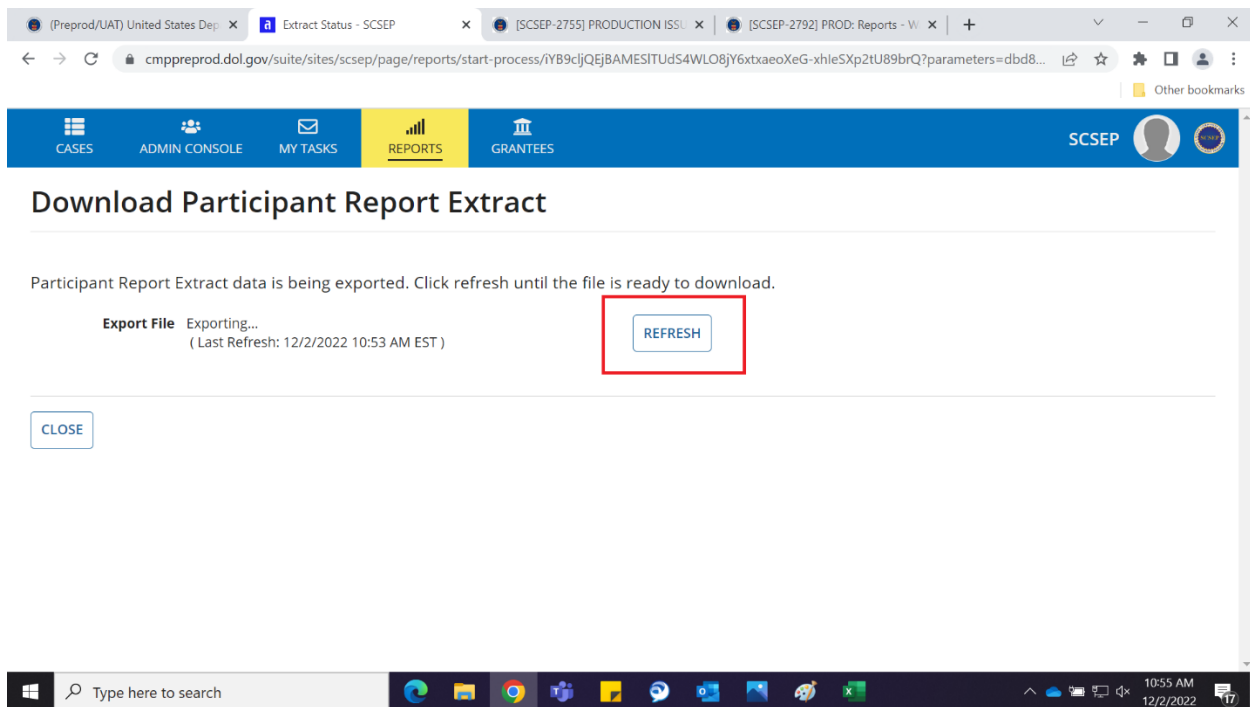
This report is actually several reports which can be chosen by selecting from the list that appears in the dropdown on the screen. You can select from among the following reports:

- 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.



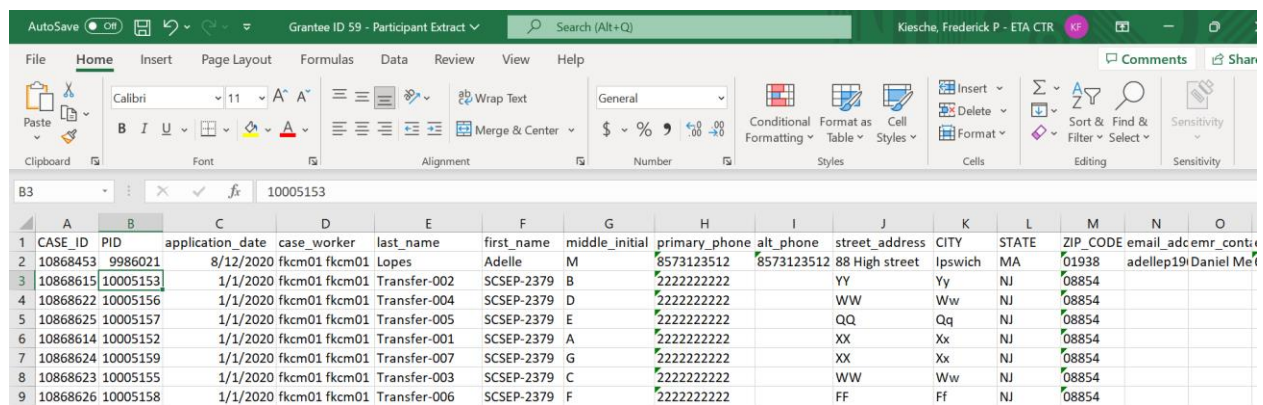
Click on the file name or right click on the file name to download a copy of the file to your default file location.

Download Participant Report Extract

Export File Grantee ID 59 - Participant Extract

CLOSE

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
	CASE_ID	PID	application_date	case_worker	last_name	first_name	middle_initial	primary_phone	alt_phone	street_address	CITY	STATE	ZIP_CODE	email	adcmr_cont
1	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.

Browser tabs: (Preprod/UAT) United States Dep, Report Summary Confirmation, [SCSEP-2755] PRODUCTION ISSU, [SCSEP-2792] PROD: Reports - W


URL: cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQejBAMESITYZSYWLO0uhr4XrbdtcM_IHW-S3jYTc0D1ymQ?parameters=33d...

Navigation: CASES, ADMIN CONSOLE, MY TASKS, **REPORTS**, GRANTEES

SCSEP [User Profile]

Report Confirmation

Exit Report

Name	Size	Generated By	Generated Date	Download
Exit Report 12-02-2022 11_36_50	48.967 KB	Fred Keische	12/2/2022 11:36 AM EST	

CLOSE

Windows Taskbar: 11:46 AM 12/2/2022

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

Browser tabs: (Preprod/UAT) United States Dep, Reports - SCSEP, [SCSEP-2755] PRODUCTION ISSU, [SCSEP-2792] PROD: Reports - W

URL: cmppreprod.dol.gov/suite/sites/scsep/page/reports

Navigation: CASES, ADMIN CONSOLE, MY TASKS, **REPORTS**, GRANTEES

SCSEP [User Profile]

Participant Hours Report

← Back

INTRODUCTION

List of all active and closed participants and their reported community service hours, paid training hours and paid sick leave hours. Data shown may reflect hours worked in the prior quarter paid in the reporting quarter. There won't be paid sick leave prior to Q3 PY19.

Filters

Program Year*

Status

Participant Last Name

Quarter

Quarter or YTD
☐ Quarter ☐ YTD

RESET

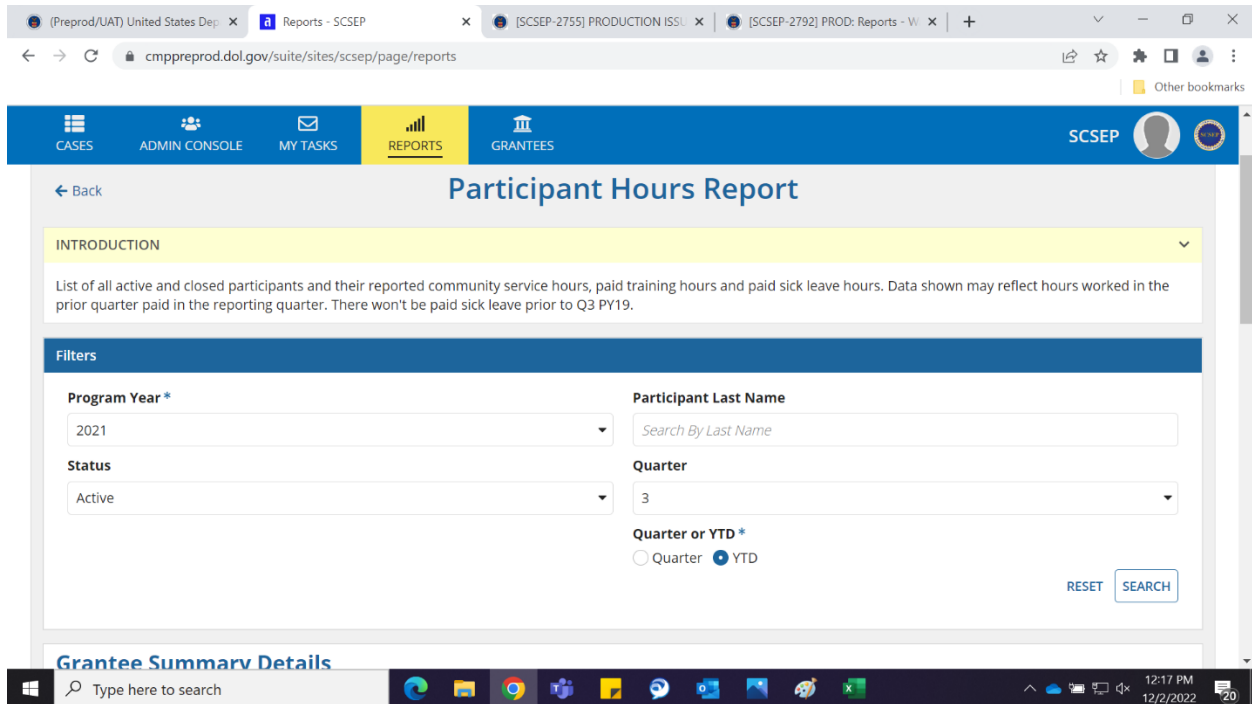
SEARCH

Windows Taskbar: 11:59 AM 12/2/2022

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.



← Back

Participant Hours Report

INTRODUCTION

List of all active and closed participants and their reported community service hours, paid training hours and paid sick leave hours. Data shown may reflect hours worked in the prior quarter paid in the reporting quarter. There won't be paid sick leave prior to Q3 PY19.

Filters

Program Year *
2021

Status
Active

Participant Last Name
Search By Last Name

Quarter
3

Quarter or YTD *
☐ Quarter
 ☒ YTD

RESET SEARCH

Grantee Summary Details

Choose desired filters and click **SEARCH**.

Grantee Summary Details		
Total Number of Enrollments	Number of Enrollments with PRA Hours	Number of Enrollments with Paid In-Person Training
10	0	1
Total Number of Active Enrollments	Number of Enrollments with Paid In-Person CSA Hours	Number of Enrollments with Paid Remote Training
10	4	0
Total Number of Closed Enrollments	Number of Enrollments with Paid Remote CSA Hours	Number of Enrollments with Paid Sick Leave
0	0	3

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.

(Preprod/UAT) United States Dep x Participant Hours Confirmation x +

cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cJQejBAMESITYXSYWOO3SU3YdGO5f5AqYnwT1ZArIbqYbTsw?parameters=10...

Other bool

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Participant Hours Grantee Summary

Participant Hours Grantee Summary data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
(Last Refresh: 12/5/2022 12:24 PM EST)

REFRESH

CLOSE

Type here to search

12:24 PM 12/5/2022

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

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Participant Hours Grantee Summary

Export File New Mexico - 2021 - Participant Hours Report Summary

CLOSE

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

AutoSave ON New Mexico - 2021 - Participant Hours Report Summary - Excel Search (Alt+Q) Kiesche, Frederick P - ETA CTR KF

File Home Insert Page Layout Formulas Data Review View Help

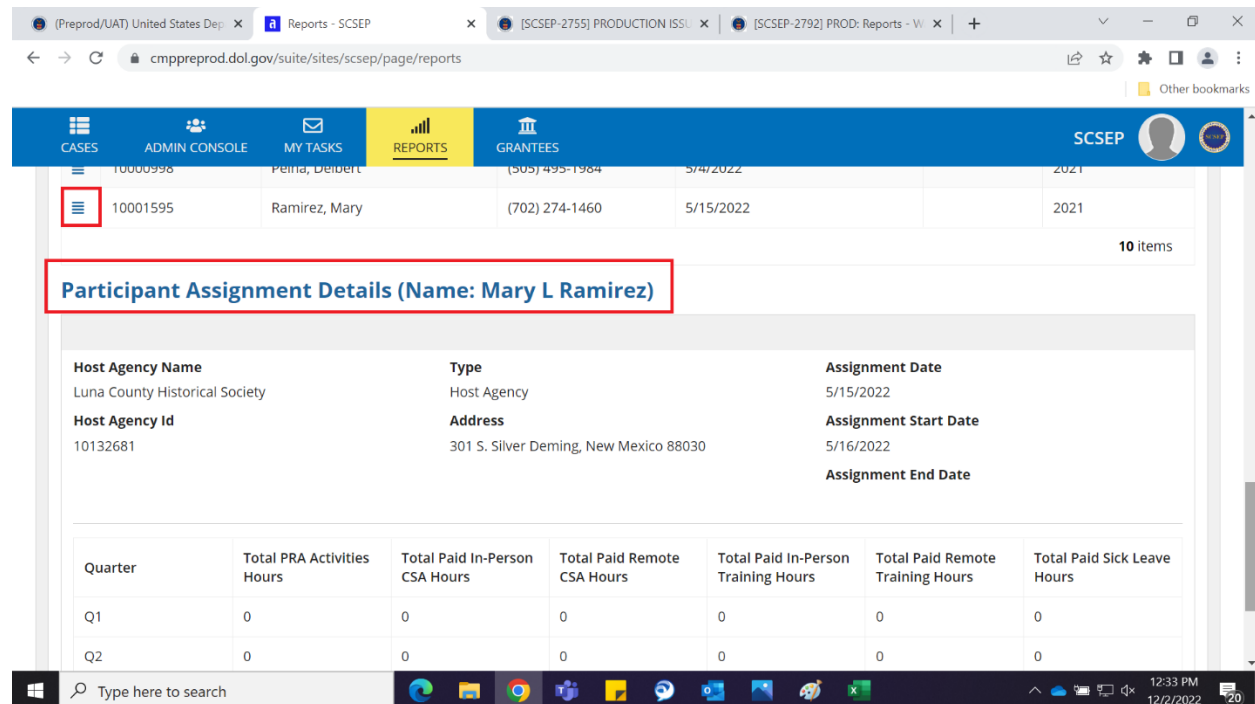
Clipboard Font Alignment Number Styles Cells Editing Sensitivity

	A	B	C	D	E	F
1	totalNumEnrollments	totalNumActiveEnrollments	totalNumClosedEnrollments	numEnrollmentsPraHours	numEnrollmentsInPersonCsaHours	numEnrollmentsRem
2	10	10	0	0	10	
3						
4						
5						

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 screenshot shows a web browser window with the URL cmppreprod.dol.gov/suite/sites/scsep/page/reports. The page has a navigation bar with tabs: CASES, ADMIN CONSOLE, MY TASKS, REPORTS (selected), and GRANTEES. A user profile for SCSEP is visible in the top right.

Below the navigation bar is a table of participants. The second row, for Participant ID 10001595 and Name Ramirez, Mary, is highlighted with a red box. To the right of the table, it says "10 items".

Below the table, a red box highlights the section title "Participant Assignment Details (Name: Mary L Ramirez)".

The details section contains the following information:

Host Agency Name Luna County Historical Society	Type Host Agency	Assignment Date 5/15/2022
Host Agency Id 10132681	Address 301 S. Silver Deming, New Mexico 88030	Assignment Start Date 5/16/2022
		Assignment End Date

Below this information is a table showing activity hours by quarter:

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	0	0	0	0	0
Q2	0	0	0	0	0	0

The Windows taskbar at the bottom shows the time as 12:33 PM on 12/2/2022.

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

Browser tabs: (Preprod/UAT) United States Dep, Reports - SCSEP, [SCSEP-2755] PRODUCTION ISSU, [SCSEP-2792] PROD: Reports - W

URL: cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other bookmarks

Navigation: CASES, ADMIN CONSOLE, MY TASKS, **REPORTS**, GRANTEES

SCSEP [User Profile]

Host Agency Name: Luna County Historical Society
 Host Agency Id: 10132681
 Type: Host Agency
 Address: 301 S. Silver Deming, New Mexico 88030
 Assignment Date: 5/15/2022
 Assignment Start Date: 5/16/2022
 Assignment End Date:

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	0	0	0	0	0
Q2	0	0	0	0	0	0
Q3	0	0	0	0	0	0
Q4	0	120	0	0	0	40

EXPORT

Taskbar: Type here to search, 12:34 PM 12/2/2022

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

Browser tabs: (Preprod/UAT) United States Dep, Participant Hours Confirmation, [SCSEP-2755] PRODUCTION ISSU, [SCSEP-2792] PROD: Reports - W

URL: cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cJQeJBAMESITYXSYWPO6_JJ_RLsxSCBP6bW_kB9eU4o0NYhg?parameters=b5d...

Other bookmarks

Navigation: CASES, ADMIN CONSOLE, MY TASKS, **REPORTS**, GRANTEES

SCSEP [User Profile]

Download Participant Hours Participant Summary

Participant Hours Participant Summary data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
 (Last Refresh: 12/2/2022 12:49 PM EST)

REFRESH

CLOSE

Taskbar: Type here to search, 12:51 PM 12/2/2022

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

Browser tabs: (Preprod/UAT) United States Dep, Participant Hours Confirmation, [SCSEP-2755] PRODUCTION ISSU, [SCSEP-2792] PROD: Reports - W

Address bar: cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQejBAMESITYXSYWPO6_JJ_RLsxSCBP6bW_kB9eU4o0NYhg?parameters=b5d...

Navigation bar: CASES, ADMIN CONSOLE, MY TASKS, **REPORTS**, GRANTEES, SCSEP [User Profile]

Download Participant Hours Participant Summary

Export File Mary L Ramirez - 2021 - Assignment Hours Report Summary

[CLOSE](#)

Windows taskbar: Type here to search, 12:53 PM 12/2/2022

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

Excel window: Mary L Ramirez - 2021 - Assignment Hours Report Summary - Excel

hostAgencyName	hostAgencyId	hostAgencyType	address	assignmentDate	assignmentStartDate
Luna County Historical Society	10132681	Host Agency	301 S. Silver Deming, New Mexico 8	5/15/2022	

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

Download Participant Hours Participant Summary

Export File Mary L Ramirez - 2021 - Assignment Hours Report Summary

CLOSE

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

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

NOTE

Select a Grantee and Sub-Grantee and then click the search button to access the list of reports. If no Sub-Grantee is selected, the report will reflect data for all Sub-Grantees within the selected Grantee.

USER ORGANIZATION FILTERS

Nationwide

☐ Yes
☒ No

Grantee*

--Select a Grantee--

Sub-Grantee

--Select a Sub-Grantee--

SEARCH

2.0 Actions

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

2.1 Participant Actions Report

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

[← Back](#)

Participant Actions Report

INTRODUCTION

List of all Participant with active Enrollments in SCSEP. For each Enrollment, the last updated data and due date for the following actions are provided: IEP, Recertification, Physical or Waiver, and safety consultation.

Filters

Show Results

☐ IEP
 ☐ Physical or Waiver
 ☐ Recertification
 ☐ Safety Consultation

Initial Assignment Date From

Initial Assignment Date To

[Reset](#) | [Search](#)

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.

Reports

[USER ORGANIZATIONS](#)
[EQUITABLE DISTRIBUTION](#)
[← Back](#)

Participant Actions Report

INTRODUCTION

List of all Participant with active Enrollments in SCSEP. For each Enrollment, the last updated data and due date for the following actions are provided: IEP, Recertification, Physical or Waiver, and safety consultation.

Filters

Show Results

☐ IEP

☐ Physical or Waiver

☐ Recertification

☐ Safety Consultation

Initial Assignment Date From



Initial Assignment Date To


[Reset](#) | [Search](#)

There are no required filters for this report.

[← Back](#)

Participant Actions Report

INTRODUCTION

List of all Participant with active Enrollments in SCSEP. For each Enrollment, the last updated data and due date for the following actions are provided: IEP, Recertification, Physical or Waiver, and safety consultation.

Filters

Show Results

☒ IEP

☒ Physical or Waiver

☒ Recertification

☒ Safety Consultation

Initial Assignment Date From



Initial Assignment Date To


[Reset](#) | [Search](#)

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

Show Results

☒ IEP

☒ Physical or Waiver

☒ Recertification

☒ Safety Consultation

Initial Assignment Date From



Initial Assignment Date To


[Reset](#) | [Search](#)
[EXPORT](#)

Summary Section

Number of Enrollments	205	Number of Actions Past Due	664
Number of Actions Pending	156	Number of IEPs Past Due	201
Number of IEPs Pending	4	Number of Recertifications Past Due	153
Number of Recertifications Pending	52	Number of Physicals or Waivers Past Due	155
Number of Physicals or Waivers Pending	50	Number of Safety Consultations Past Due	155
Number of Safety Consultations Pending	50		

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

Show Results
☒ IEP
☒ Recertification

☒ Physical or Waiver
☒ Safety Consultation

Initial Assignment Date From

Initial Assignment Date To

[Reset](#) | [Search](#)

EXPORT

Summary Section			
Number of Enrollments	205	Number of Actions Past Due	664
Number of Actions Pending	156	Number of IEPs Past Due	201
Number of IEPs Pending	4	Number of Recertifications Past Due	153
Number of Recertifications Pending	52	Number of Physicals or Waivers Past Due	155
Number of Physicals or Waivers Pending	50	Number of Safety Consultations Past Due	155
Number of Safety Consultations Pending	50		

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.

[Other bookmark](#)

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

GRANTEES

SCSEP

Report Confirmation

Participant Actions Report				
Name	Size	Generated By	Generated Date	Download
PRA_REPORT 2023-07-14 03:42:59	31.447 KB	Fred Keische	7/14/2023 3:43 PM EDT	

CLOSE

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.

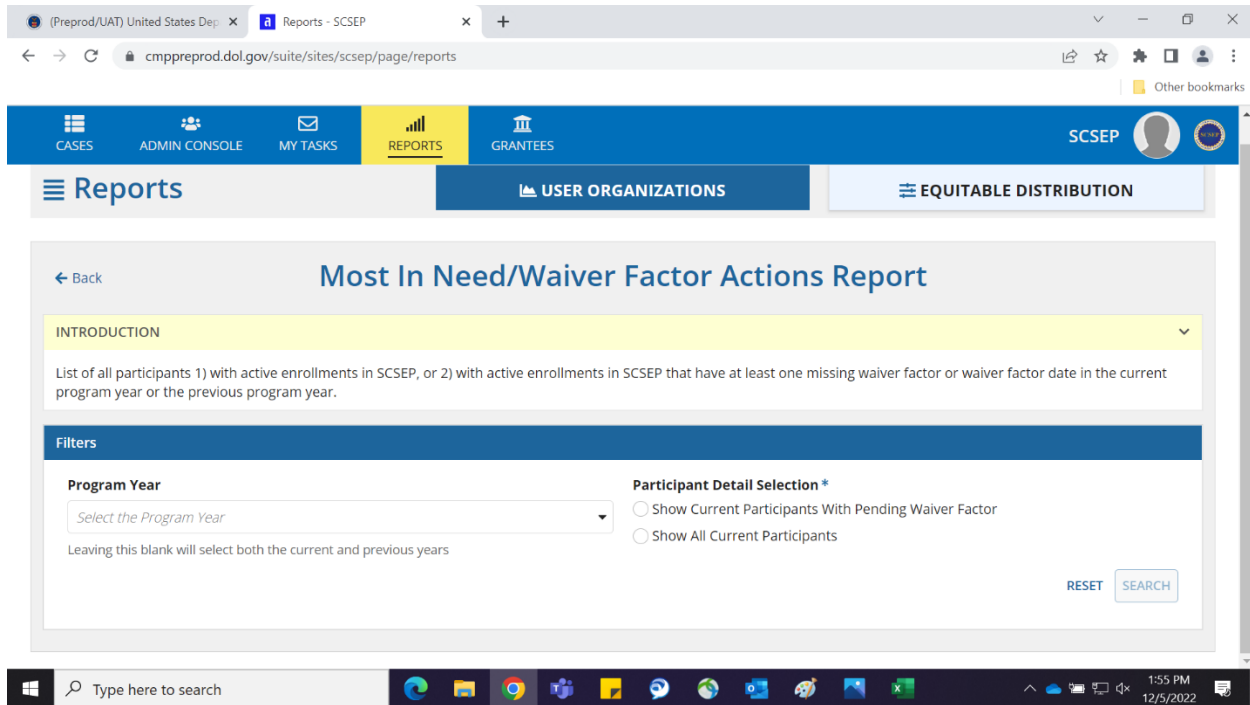
[illegible]

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.

[illegible]

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



(Preprod/UAT) United States Dep x Reports - SCSEP x +

cmppreprod.dol.gov/suite/sites/scsep/page/reports

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Reports USER ORGANIZATIONS EQUITABLE DISTRIBUTION

← Back **Most In Need/Waiver Factor Actions Report**

INTRODUCTION

List of all participants 1) with active enrollments in SCSEP, or 2) with active enrollments in SCSEP that have at least one missing waiver factor or waiver factor date in the current program year or the previous program year.

Filters

Program Year

Select the Program Year

Leaving this blank will select both the current and previous years

Participant Detail Selection *

☐ Show Current Participants With Pending Waiver Factor

☐ Show All Current Participants

RESET SEARCH

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.



Reports USER ORGANIZATIONS EQUITABLE DISTRIBUTION

← Back **Most In Need/Waiver Factor Actions Report**

INTRODUCTION

List of all participants 1) with active enrollments in SCSEP, or 2) with active enrollments in SCSEP that have at least one missing waiver factor or waiver factor date in the current program year or the previous program year.

Filters

Program Year

Select the Program Year

Select the Program Year

2023 - Current Program Year

2022 - Previous Program Year

Both

Participant Detail Selection *

☐ Show Current Participants With Pending Waiver Factor

☐ Show All Current Participants

RESET SEARCH

- **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.

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

[← Back](#)

Most In Need/Waiver Factor Actions Report

INTRODUCTION

List of all participants 1) with active enrollments in SCSEP, or 2) with active enrollments in SCSEP that have at least one missing waiver factor or waiver factor date in the current program year or the previous program year.

Filters

Program Year

Select the Program Year

Leaving this blank will select both the current and previous years

Participant Detail Section *

☐ Show Current Participants With Pending Waiver Factor
 ☐ Show All Current Participants

[RESET](#)
[SEARCH](#)

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.

Reports

USER ORGANIZATIONS

EQUITABLE DISTRIBUTION

[← Back](#)

Most In Need/Waiver Factor Actions Report

INTRODUCTION

List of all participants 1) with active enrollments in SCSEP, or 2) with active enrollments in SCSEP that have at least one missing waiver factor or waiver factor date in the current program year or the previous program year.

Filters

Program Year

2022 - Previous Program Year

Leaving this blank will select both the current and previous years

Participant Detail Section *

☒ Show Current Participants With Pending Waiver Factor
 ☐ Show All Current Participants

[RESET](#)
[SEARCH](#)

Results Summary

Number of Participants:	5	Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year:	0
Number of Participants 1 Year From Durational Limit:	1	Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year:	N/A
Percent of Participants 1 Year from Durational Limit:	20%	Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year:	0
Number of Participants with Waiver Factors in need of update 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	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 Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year:	0
Number of Participants with Waiver Factors in need of update in Previous Program Year:	5	Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year:	N/A
Percent of Participants with Waiver Factors in need of update in Previous Program Year:	100%		

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**.

☰	9959690	Arlene Russell	(505) 486-3308	2/27/2018 7:00 PM EST	9/20/2018 8:00 PM EDT	9/19/2023 8:00 PM EDT	11/16/1958	San Juan County
☰	9963781	Jamie Ford	(505) 357-4628	12/5/2018 7:00 PM EST	12/20/2018 7:00 PM EST	2/3/2024 7:00 PM EST	11/04/1961	Valencia County

<< < 1 – 10 of 45 > >>

EXPORT

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

(Preprod/UAT) United States Dep... Participant Details Confirmation

cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/iYB9cIjQeJBAMESITYXR45POz6ddsIjZerJ7r7xQ90NBzrQInvxvA?parameters=34bafd...

Other bookmarks

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Waiver Factor Participant Details Report

Waiver Factor Participant Details Report data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
 (Last Refresh: 12/5/2022 1:35 PM EST)

REFRESH

CLOSE

Type here to search

1:35 PM 12/5/2022

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

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Waiver Factor Participant Details Report

Export File MINWFA_Report_7/17/2023 9:25 AM EDT

CLOSE

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	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U
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																			
13	Year																				
	Summary	Details																			

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Participant	Participant	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_2023_	PY_2023_
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	Nc
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 -	Nc
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 fkc01, fk							No as of (		No - 09/22	Ye
9	Retest-001	10003885	(222) 222- 1/1/2022	1/1/2022	No	4/27/2026	1/1/1950			Cape May fkc01, fk							No as of (		No - 11/11	Ye
10	Retest-001	10003887	(222) 222- 1/1/2022	1/1/2022	No	4/27/2026	1/1/1950			Cape May fkc01, fk							No as of (		No - 09/22	Ye
11	Retest-001	10003893	(222) 222- 1/1/2022	1/1/2022	No	N/A	--	Cur	1/1/1950	Glouceste fkc01, fk							No as of (		No - 09/23	Ye
12	Retest-001	10004228	(222) 222- 1/1/2022	1/2/2022	No	N/A	--	Cur	1/1/1950	Cape May fkc01, fk							No as of (		No - 09/27	Ye
13	Retest-001	10004230	(222) 222- 3/3/2022	3/3/2022	No	3/9/2026	1/1/1950			Essex Cou fkc01, fk							No as of (		No - 10/03	Ye
14	Retest-011	10004839	(222) 222- 1/1/2022	1/1/2022	No	5/2/2027	1/1/1950			Cape May fkc01, fk							No as of (		No - 09/25	Nc
15	Test-002	10004861	(222) 222- 1/1/2021	1/1/2021	No	12/31/202	1/1/1950			Cape May fkc01, fk							No as of (		No - 10/03	Nc
16	Test-004	10004874	(222) 222- 8/1/2022	8/1/2022	No	12/30/202	1/1/1950			Glouceste fkc01, fk							No as of (		No - 10/27	Ye
17	Test-001	10004945	(222) 222- 1/1/2022	1/1/2022	#####	1/12/2026	1/1/1950			Sussex Co fkc01, fk							No as of (		No - 10/26	Nc
18	Orientatio	10005145	(222) 222- 1/1/2020	1/1/2020	No	12/30/202	1/1/1950			Essex Cou fkc01, 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			Hunterdoifkc01, fk							No as of (		Yes - 11/1	Ye
20	Transfer-1	10005354	(222) 222- 1/1/2020	4/2/2020	No	12/31/202	1/1/1950			Glouceste fkc01, fk							No as of (		No - 12/13	Nc
21	Transfer-1	10005355	(222) 222- 1/1/2020	4/2/2022	No	12/31/202	1/1/1950			Glouceste fkc01, fk							No as of (		No - 12/13	Nc
	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	Limited English Proficiency
Still time for credit	Still time for credit
Frail	Low Literacy Skills
Still time for credit	Still time for credit
Old Enough, Not Receiving SS Title II	75 or Older
Still time for credit	No as of (6/30/2022)
Severely Ltd Emp Prospects	Formerly Incarcerated
Still time for credit	

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

[← Back](#)

Follow-Up Reports

Introduction

List of all current and historical follow-up activity during the selected program year. A placement can appear on the list of follow-ups more than once if the placement needs multiple follow-ups completed. The follow-up scheduled dates and employer information is displayed.

Instructions

Filters

Program Year *
 Choose the Program Year

Follow-Up Status *
☐ Pending Follow-Up
☐ Overdue Follow-Up
☐ Expired Follow-Up
☐ Successful Follow-Up
☐ Negative Follow-Up

Follow-Up Category *
 Choose a Follow-up Category

[Reset](#) | [Search](#)

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.

[← Back](#)

Follow-Up Reports

Introduction

List of all current and historical follow-up activity during the selected program year. A placement can appear on the list of follow-ups more than once if the placement needs multiple follow-ups cor

Instructions

Filters

Program Year *
 Choose the Program Year
 Choose the Program Year
 2018
 2019
 2020
 2021
 2022
 2023

Follow-Up Status *
☐ Pending Follow-Up
☐ Overdue Follow-Up
☐ Expired Follow-Up
☐ Successful Follow-Up
☐ Negative Follow-Up

- 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.

[← Back](#)

Follow-Up Reports

Introduction

List of all current and historical follow-up activity during the selected program year. A placement can appear on the list of follow-ups more than once if the placement needs multiple follow-ups completed. The follow-up scheduled dates and employer information is displayed.

Instructions

Choose a Follow-up Category

1
2
3
All
Choose a Follow-up Category

Follow-Up Status *

☐ Pending Follow-Up
☐ Overdue Follow-Up
☐ Expired Follow-Up
☐ Successful Follow-Up
☐ Negative Follow-Up

[Reset](#) | [Search](#)

- 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.

[← Back](#)

Follow-Up Reports

Introduction

List of all current and historical follow-up activity during the selected program year. A placement can appear on the list of follow-ups more than once if the placement needs multiple follow-ups completed. The follow-up scheduled dates and employer information is displayed.

Instructions

Filters

Program Year *

2022

Follow-Up Category *

All

Follow-Up Status *

☒ Pending Follow-Up
☒ Overdue Follow-Up
☒ Expired Follow-Up
☒ Successful Follow-Up
☒ Negative Follow-Up

[Reset](#) | [Search](#)

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.

[EXPORT](#)

Summary	
Count of Cases ?	Number of Expired Follow-ups ?
5	0
Number of Pending Follow-Ups ?	Number of Successful Follow-ups ?
0	12
Number of Overdue Follow-ups ?	Number of Negative Follow-ups ?
0	0

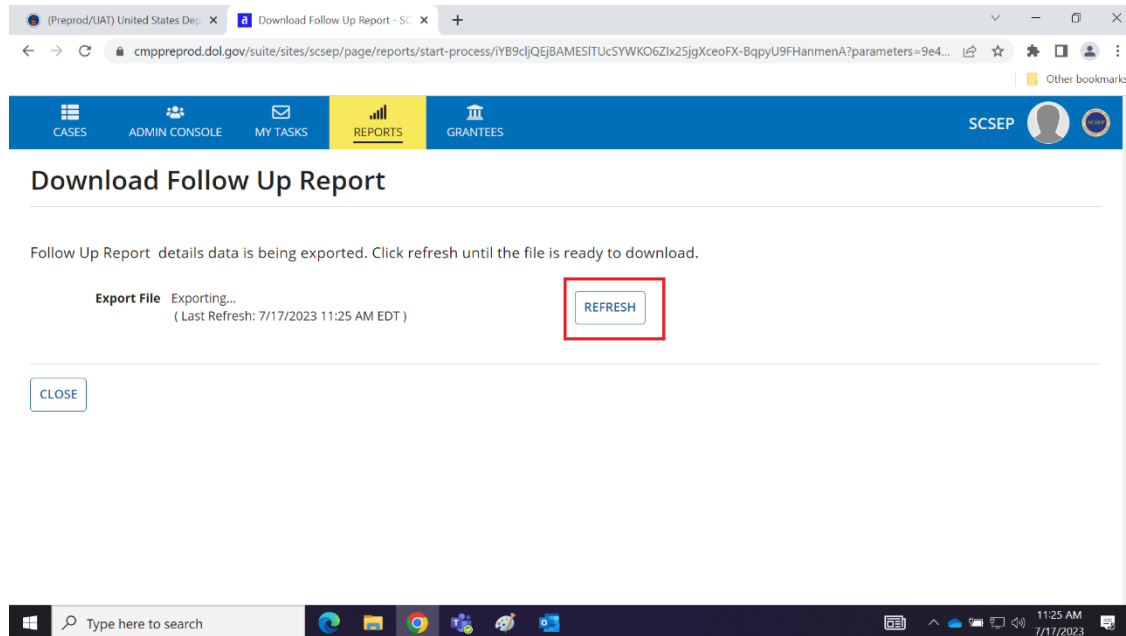
Follow Up Report (2020)																	
Follow Up Results Details																	
Up1 Index	Follow-up Status	Follow-up1 Scheduled Date	Follow-up2 Completed Date	Follow-up3 Completed Status	Follow-up3 Completed Date	Employer	Address Line 1	Address Line 2	City	State	Zip	Employer Contact	Employer Contact Title	Employer Contact Phone Number	Employer Contact Email	Placement Start Date	Placement End Date
21	Success	1/01/2021	12/29/2021	Success	1/1/2022	3/21/2022	Success	Zuni Home Health Care Agency	Route North Building 52	Zuni Pueblo	New Mexico	87327	Ms.Ghachua, Carol	Acting Director	(505) 782-5544		3/18/2021

[EXPORT](#)

Summary

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

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



(Preprod/UAT) United States Dep: x Download Follow Up Report - SC x

cmpprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQEjBAMESITucSYWKO6Zlx25jgXceofX-BqpyU9FHanmenA?parameters=9e4...

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Follow Up Report

Follow Up Report details data is being exported. Click refresh until the file is ready to download.

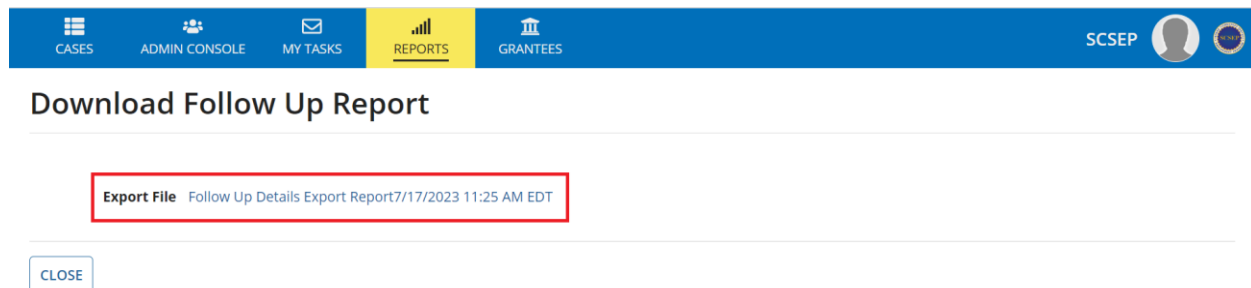
Export File Exporting...
(Last Refresh: 7/17/2023 11:25 AM EDT)

[REFRESH](#)

[CLOSE](#)

Type here to search 11:25 AM 7/17/2023

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



CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Download Follow Up Report

Export File Follow Up Details Export Report7/17/2023 11:25 AM EDT

[CLOSE](#)

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.

A2	A	B	C	D	E	F
1	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-ups
2	5	0	0	0	12	
3						
4						
5						
6						
7						
8						
9						
10						
11						
12						
13						
14						
15						
16						
17						
18						
19						
20						

Summary Details

A7	A	B	C	D	E	F	G	H	I	J
1	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 Residence
2	690	NM001	Juana	Locaspino	9954373	10365571	(505) 495-5500		Smith, Mary	McKinley County
3	690	NM001	Kathleen	Mellott	9956733	10365435	(505) 402-4490	mellott48@msa.c	Smith, Mary	San Juan County
4	690	NM001	Kathleen	Mellott	9956733	10365435	(505) 402-4490	mellott48@msa.c	Smith, Mary	San Juan County
5	690	NM001	Melinda	Russell	9983161	10365596	(575) 533-6324	melcraig1963@ya	Smith, Mary	Catron County
6	690	NM001	Ramona	Jaramillo	9980876	10365462	(505) 818-0489	RamonaFrancesJe	Smith, Mary	Bernalillo County
7										
8										
9										
10										
11										
12										
13										
14										
15										
16										
17										
18										
19										
20										
21										

Summary Details

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

Reports

[USER ORGANIZATIONS](#)
[EQUITABLE DISTRIBUTION](#)
[← Back](#)

Assignment by Host Agency Report

Filters

- ☐ Display Active Host Agencies Only
 ☐ Display Active Assignments Only
- Assignment Active From
 
- Assignment Active Through
 
- ☐ Show Report Summary
☐ Show Organization Summary
☐ Show Most Recent Assignment Only

[RESET](#)
[SEARCH](#)



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

[← Back](#)

Assignment by Host Agency Report

Filters

- ☐ Display Active Host Agencies Only
 ☒ Display Active Assignments Only
- Assignment Active From
 
- Assignment Active Through
 
- ☒ Show Report Summary
☒ Show Organization Summary
☐ Show Most Recent Assignment Only

[RESET](#)
[SEARCH](#)

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	213	Number of Active Host Agencies	28
Average Number of Participants	3	Average Length of Assignment	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 - Continuity 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.

EXPORT

Report Summary

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

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

Download Assignment by Host Agency Report

AHA Report details data is being exported. Click refresh until the file is ready to download.

Export File Exporting...
(Last Refresh: 7/17/2023 2:46 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.

Download Assignment by Host Agency Report

Export File Assignments_by_Host_Agency_7/17/2023 2:49 PM EDT

CLOSE

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	C	D	E	F	G	H	I	J	K	L	M	N	O
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													
5															
6															
7															
8															
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															
19															
20															
21															

ReportSummary

OrgSummary

participantSummary

	A	B	C	D	E	F
1	Name of host agency	ID	FEIN	Address	Type	Number of Agencies
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	
21	Northwest New Mexico Arts C	10175816	364762584	203 Rio Communities Blvd, New Mexico, Belen, 87002	Not For Profit	

ReportSummary

OrgSummary

participantSummary

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

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

(Preprod/UAT) United States Dep
 Reports - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Reports

USER ORGANIZATIONS
 EQUITABLE DISTRIBUTION

Customer Satisfaction Survey

Customer Satisfaction Summary

Total Number of Employers with Pending Employer Survey: 0

Number of Employers where Pending Employer Survey is between 81 and 100 days from expiration: 0

Number of Employers where Pending Employer Survey is between 41 and 80 days from expiration: 0

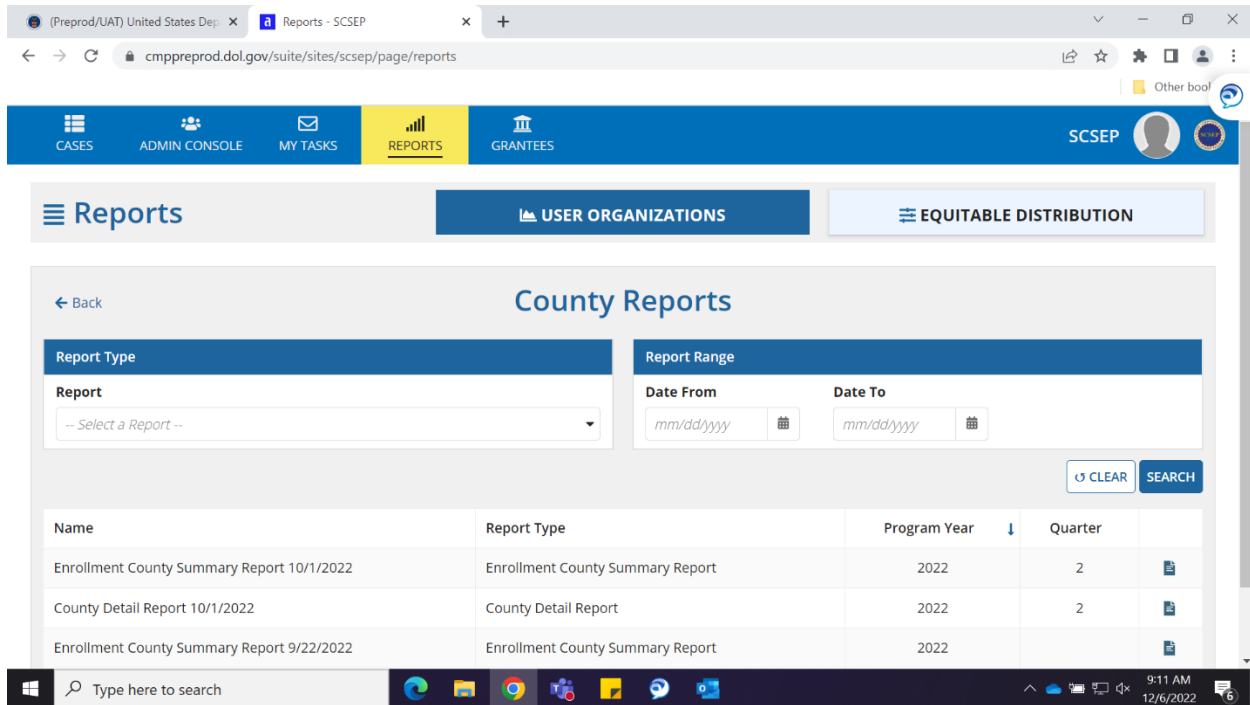
Number of Employers where Pending Employer Survey is between 21 and 40 days from expiration: 0

Number of Employers where Pending Employer Survey is between 1 and 20 days from expiration: 0

EXPORT

Employer Address Address First Last supervisor supervisor supervisor supervisor Employer

3.2 County Reports



← Back

County Reports

Report Type
Report
 -- Select a Report --

Report Range
Date From
Date To

CLEAR SEARCH

Name	Report Type	Program Year	Quarter	
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2	
County Detail Report 10/1/2022	County Detail Report	2022	2	
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022		

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.

(Preprod/UAT) United States Dep... Reports - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other book

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

Reports USER ORGANIZATIONS EQUITABLE DISTRIBUTION

← Back **County Reports**

Report Type
Report
 -- Select a Report --

Report Range
Date From **Date To**
 mm/dd/yyyy mm/dd/yyyy

CLEAR SEARCH

Name	Report Type	Program Year	Quarter
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2
County Detail Report 10/1/2022	County Detail Report	2022	2
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022	

Type here to search 9:11 AM 12/6/2022

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.

(Preprod/UAT) United States Dep... Reports - SCSEP

cmppreprod.dol.gov/suite/sites/scsep/page/reports

Other bookmarks

CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

← Back **County Reports**

Report Type
Report
 -- Select a Report --

Report Range
Date From **Date To**
 mm/dd/yyyy mm/dd/yyyy

CLEAR SEARCH

Name	Report Type	Program Year	Quarter
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2
County Detail Report 10/1/2022	County Detail Report	2022	2
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022	
County Detail Report 9/22/2022	County Detail Report	2022	

Type here to search 9:14 AM 12/6/2022

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

Browser: (Preprod/UAT) United States Dep... Reports - SCSEP
 URL: cmppreprod.dol.gov/suite/sites/scsep/page/reports

Navigation: CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

County Reports

Report Type
 Report: Enrollment County Summary Report

Report Range
 Date From: mm/dd/yyyy Date To: mm/dd/yyyy

[CLEAR] [SEARCH]

Enrollment County Summary Report

Name	Report Type	Program Year	Quarter	
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2	[Download Icon]
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022		[Download Icon]

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.

Excel File: Enrollment by County Summary 10_1_2022 - Excel

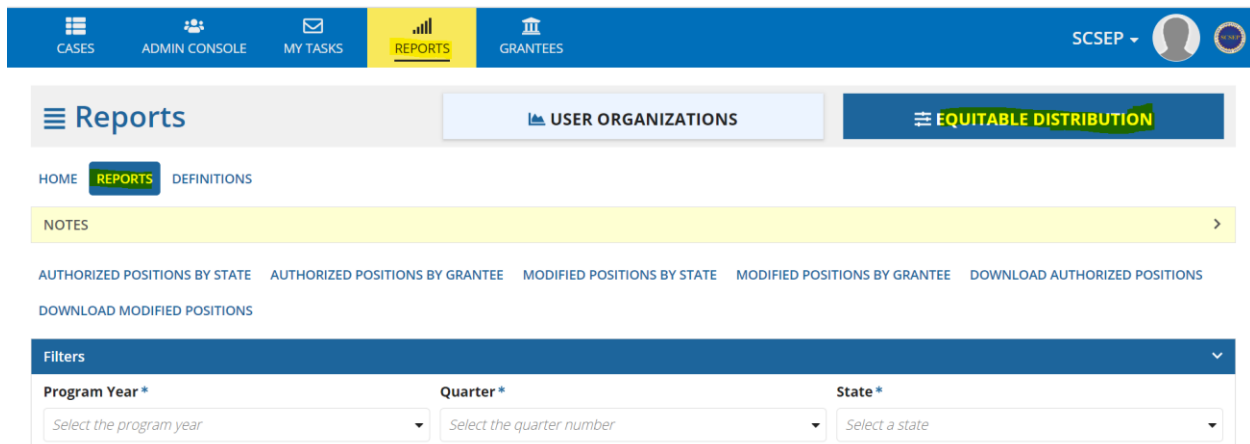
FIPS	STATE	NA	COUNTY	I	AARP	Fou	Alabama	Alaska	American	Arizona	Arkansas	Associació	Associate	California	Center fo	Colorado	Connectic	Delaware	District of	Easter Se	Example
001	Alabama		Autauga County																		10
003	Alabama		Baldwin County																		2
005	Alabama		Barbour County													1					
009	Alabama		Blount County													2					
011	Alabama		Bullock County													4					
013	Alabama		Butler County													4					
015	Alabama		Calhoun County				7									16					
017	Alabama		Chambers County				2														5
019	Alabama		Cherokee County													6					

Equitable Distribution (ED) Report

[2. Equitable Distribution \(ED\) Report](#)

2. Equitable Distribution (ED) Report

This report highlights the grantee's performance by comparing the authorized positions allotted to them in a given county and the number of enrollees in SCSEP within the county. It is one of the tools available to grantees to track their enrollments within the program.



The screenshot shows the SCSEP application interface. The top navigation bar includes links for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. On the right, there is a SCSEP dropdown and a user profile icon. Below the navigation bar, the 'Reports' section is active, with a sub-menu showing 'USER ORGANIZATIONS' and 'EQUITABLE DISTRIBUTION' (highlighted). Under 'EQUITABLE DISTRIBUTION', there are links for HOME, REPORTS (highlighted), and DEFINITIONS. A 'NOTES' section is also visible. Below the notes, there are links for AUTHORIZED POSITIONS BY STATE, AUTHORIZED POSITIONS BY GRANTEE, MODIFIED POSITIONS BY STATE, MODIFIED POSITIONS BY GRANTEE, DOWNLOAD AUTHORIZED POSITIONS, and DOWNLOAD MODIFIED POSITIONS. A 'Filters' section is present with three dropdown menus: Program Year* (with placeholder 'Select the program year'), Quarter* (with placeholder 'Select the quarter number'), and State* (with placeholder 'Select a state').

The report can be accessed via the navigational path: REPORTS > EQUITABLE DISTRIBUTION > REPORTS

The following options are available on the ED Report:

AUTHORIZED POSITIONS BY STATE
 AUTHORIZED POSITIONS BY GRANTEE
 MODIFIED POSITIONS BY STATE
 MODIFIED POSITIONS BY GRANTEE
 DOWNLOAD AUTHORIZED POSITIONS
 DOWNLOAD MODIFIED POSITIONS

AUTHORIZED POSITIONS BY STATE:

- 1) Click the AUTHORIZED POSITIONS BY STATE link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Select the **State**
- 5) Click **SEARCH**



The screenshot shows the 'Filters' section of the application. It contains three dropdown menus: Program Year* (set to 2023), Quarter* (set to 2), and State* (set to New Jersey). A yellow 'SEARCH' button is located to the right of the filters.

Authorized Positions by State

AUTHORIZED POSITIONS BY GRANTEE

- 1) Click the AUTHORIZED POSITIONS BY GRANTEE link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Select the **Grantee**
- 5) Click **SEARCH**

Filters ▼

Program Year *

Quarter *

Grantee *

Authorized Positions by Grantee

MODIFIED POSITIONS BY STATE:

- 1) Click the MODIFIED POSITIONS BY STATE link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Select the **State**
- 5) Click **SEARCH**

Filters ▼

Program Year *

Quarter *

State *

Modified Positions by State

MODIFIED POSITIONS BY GRANTEE:

- 1) Click the MODIFIED POSITIONS BY GRANTEE link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Select the **Grantee**
- 5) Click **SEARCH**

[AUTHORIZED POSITIONS BY STATE](#)
[AUTHORIZED POSITIONS BY GRANTEE](#)
[MODIFIED POSITIONS BY STATE](#)
[MODIFIED POSITIONS BY GRANTEE](#)
[DOWNLOAD AUTHORIZED POSITIONS](#)
[DOWNLOAD MODIFIED POSITIONS](#)

Filters

Program Year *

2023

Quarter *

2

Grantee *

Associates for Training & Development

SEARCH

Modified Positions by Grantee

DOWNLOAD AUTHORIZED POSITIONS

- 1) Click the **DOWNLOAD AUTHORIZED POSITIONS** link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Click the Download Generated File icon

[AUTHORIZED POSITIONS BY STATE](#)
[AUTHORIZED POSITIONS BY GRANTEE](#)
[MODIFIED POSITIONS BY STATE](#)
[MODIFIED POSITIONS BY GRANTEE](#)
[DOWNLOAD AUTHORIZED POSITIONS](#)
[DOWNLOAD MODIFIED POSITIONS](#)

Filters

Program Year *

2023

Quarter *

2



Download Generated File

Download Authorized Positions

DOWNLOAD MODIFIED POSITIONS

- 1) Click the **MODIFIED AUTHORIZED POSITIONS** link
- 2) Select the **Program Year**
- 3) Select the **Quarter**
- 4) Click the Download Generated File icon

[AUTHORIZED POSITIONS BY STATE](#)
[AUTHORIZED POSITIONS BY GRANTEE](#)
[MODIFIED POSITIONS BY STATE](#)
[MODIFIED POSITIONS BY GRANTEE](#)
[DOWNLOAD AUTHORIZED POSITIONS](#)

DOWNLOAD MODIFIED POSITIONS

Filters

Program Year *

2023

Quarter *

2



Download Generated File

Download Modified Positions

MY TASKS

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

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

SCSEP +

SCSEP Cases

NOTE

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.

Participant Name

Search by Participant Name

SEARCH

+ Show Filters

Participant Cases

ADD NEW CASE

There are two sections under *MY TASKS*:

- Case Tasks
- Notifications

CASES

ADMIN CONSOLE

MY TASKS

REPORTS

SCSEP +

All Tasks and Notifications for Edcasemgr Denk

All Tasks

Past Due

Due Soon

Upcoming

Escalated

+ Show Filters

Participant Name	Participant ID	Case ID	Case Status	Task Type	Escalated?	Due Date	Status	Description
Scsep-699 Test-033 iep cm initial task	10006612	10870243	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-1623 Test-001	10006418	10870033	Active	Reassessment	—	6/6/2023	!	It has been 15 days since the assignment date or the anniversary of the assignment date and the date for the offer of the physical exam has not been e... Show More

Notifications (22)

Notification Type

SORT

IF

Reassessment and/or IEP Due Date Reminder: 10868792

Due Date: 7/2/2023

Participant: (Case ID: 10868792)

Reassessment and/or IEP Due Date Reminder: 10868773

Due Date: 7/2/2023

Participant: (Case ID: 10868773)

Reassessment and/or IEP Due Date Reminder: 10868794

Due Date: 7/10/2023

Participant: (Case ID: 10868794)

Case 10870212 has been assigned to you

Due Date: 7/11/2023

Participant: Scsep-699 Test-004 cm 3rd notification (Case ID: 10870212)

Case 10870213 has been assigned to you

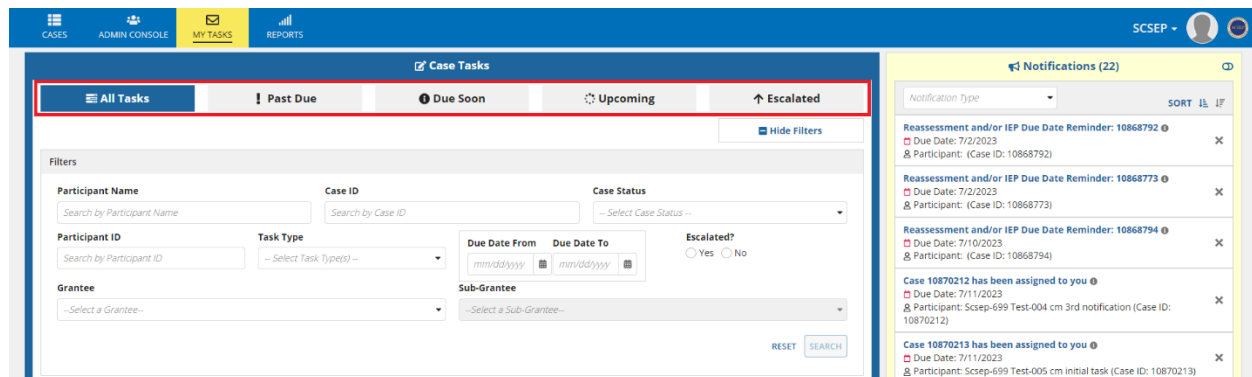
1. Tasks

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:

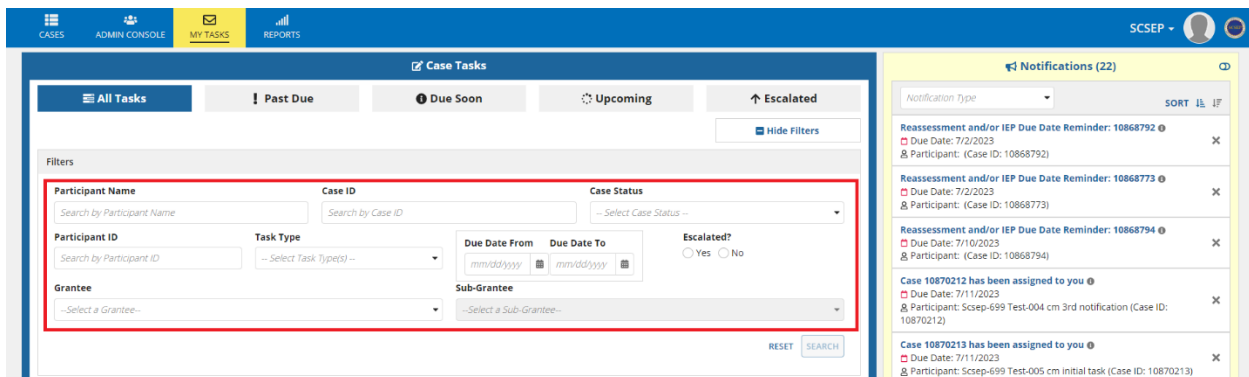
- **All Tasks** – All tasks assigned to the user appear.
- **Past Due** – Tasks that are past their assigned due date appear.
- **Due Soon** – Tasks that are two days or less from their due date appear.
- **Upcoming** – Tasks that are seven days or less from their due date appear.
- **Escalated** – Tasks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



The screenshot displays the 'Case Tasks' sub-screen. The top navigation bar includes 'CASES', 'ADMIN CONSOLE', 'MY TASKS' (highlighted), and 'REPORTS'. The user is logged in as 'SCSEP'. The main area is titled 'Case Tasks' and features tabs for 'All Tasks', 'Past Due', 'Due Soon', 'Upcoming', and 'Escalated'. A 'Hide Filters' button is present. The 'Filters' section is highlighted with a red box and includes the following fields:

- Participant Name:** Search by Participant Name
- Case ID:** Search by Case ID
- Case Status:** -- Select Case Status --
- Participant ID:** Search by Participant ID
- Task Type:** -- Select Task Type(s) --
- Due Date From:** mm/dd/yyyy
- Due Date To:** mm/dd/yyyy
- Escalated?:** Yes No
- Grantee:** -- Select a Grantee --
- Sub-Grantee:** -- Select a Sub-Grantee --

At the bottom of the filter section are 'RESET' and 'SEARCH' buttons. On the right, a 'Notifications (22)' sidebar shows a list of notifications, including reminders and case assignments.

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.

CASESADMIN CONSOLEMY TASKSREPORTSGRANTEES

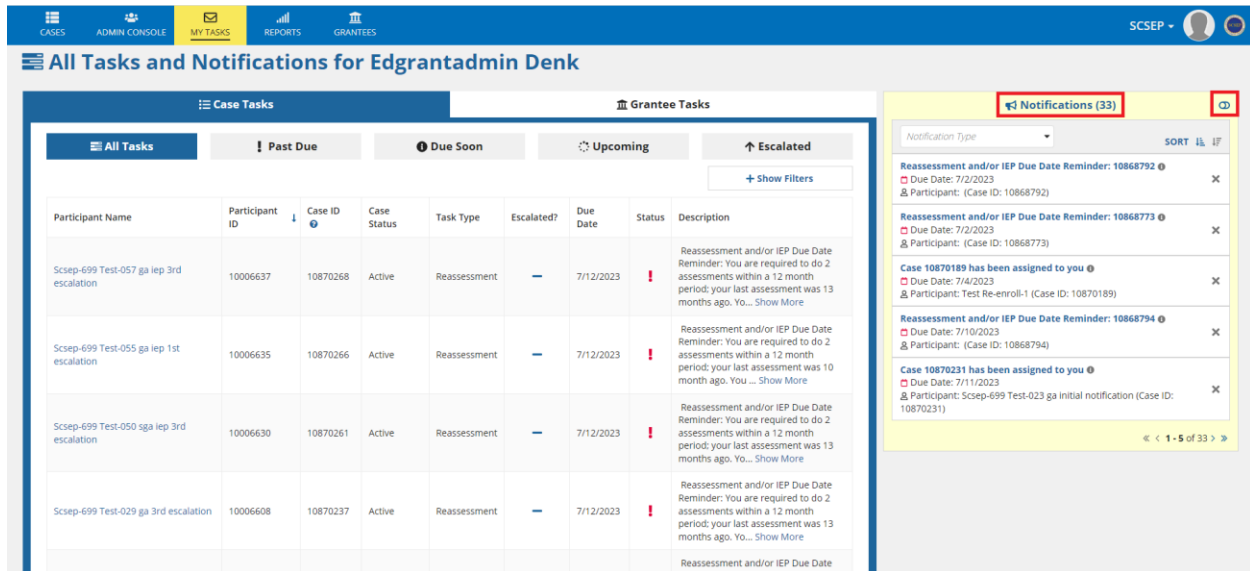
Scsdp-699 Test-027 ga 1st escalation	10006606	10870235	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 10 months ago. You ... Show More</div>
Scsdp-699 Test-026 gsa initial task	10006605	10870234	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 9 months ago. You o... Show More</div>
Scsdp-699 Test-022 sga 3rd escalation	10006601	10870230	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>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</div>
Scsdp-699 Test-020 sga 1st escalation	10006599	10870228	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>Reassessment and/or IEP Due Date Reminder: You are required to do 2 assessments within a 12 month period; your last assessment was 10 months ago. You ... Show More</div>
Scsdp-699 Test-015 sup 3rd escalation	10006594	10870223	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>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</div>
Scsdp-699 Test-008 cm 3rd escalation	10006587	10870216	Active	Reassessment	<div></div>	7/12/2023	<div></div> <div>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</div>

<< >- 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.



All Tasks and Notifications for Edgrantadmin Denk

Case Tasks

Participant Name	Participant ID	Case ID	Case Status	Task Type	Escalated?	Due Date	Status	Description
Scsep-699 Test-057 ga iep 3rd escalation	10006637	10870268	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-055 ga iep 1st escalation	10006635	10870266	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 months ago. Yo... Show More
Scsep-699 Test-050 sga iep 3rd escalation	10006630	10870261	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-029 ga 3rd escalation	10006608	10870237	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

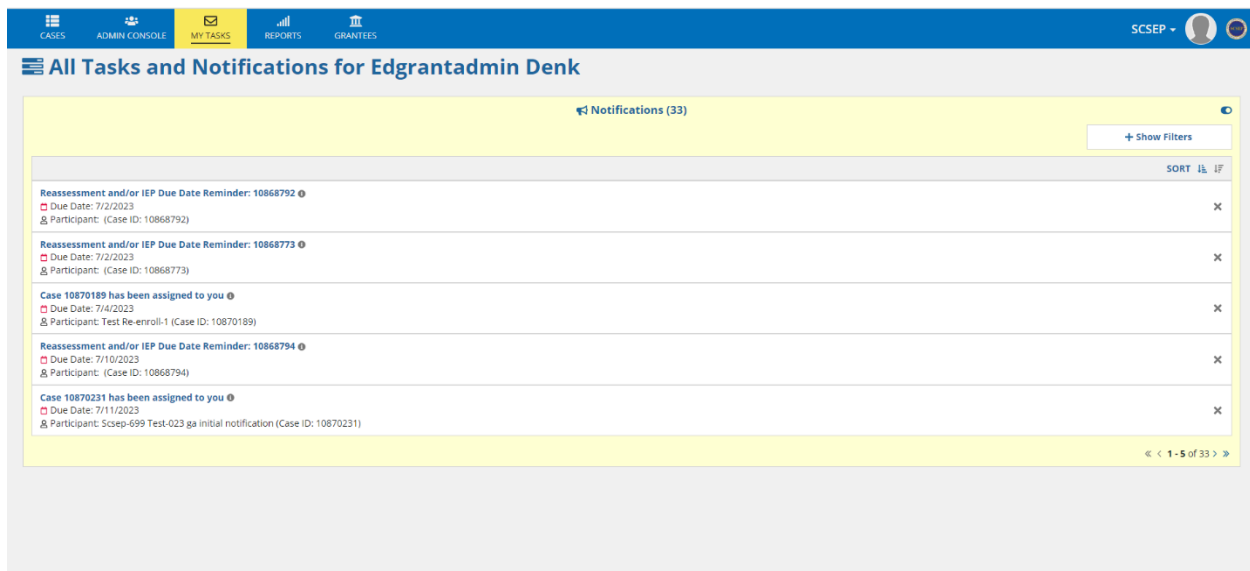
Grantee Tasks

Notifications (33)

Notification Type: ▼ SORT ⌵ ⌶

- Reassessment and/or IEP Due Date Reminder: 10868792 ⌵
 Due Date: 7/2/2023
 Participant: (Case ID: 10868792)
- Reassessment and/or IEP Due Date Reminder: 10868773 ⌵
 Due Date: 7/2/2023
 Participant: (Case ID: 10868773)
- Case 10870189 has been assigned to you ⌵
 Due Date: 7/4/2023
 Participant: Test Re-enroll-1 (Case ID: 10870189)
- Reassessment and/or IEP Due Date Reminder: 10868794 ⌵
 Due Date: 7/10/2023
 Participant: (Case ID: 10868794)
- Case 10870231 has been assigned to you ⌵
 Due Date: 7/11/2023
 Participant: Scsep-699 Test-023 ga initial notification (Case ID: 10870231)

« < 1 - 5 of 33 »



All Tasks and Notifications for Edgrantadmin Denk

Notifications (33)






+ Show Filters


SORT ⌵ ⌶


- Reassessment and/or IEP Due Date Reminder: 10868792 ⌵
 Due Date: 7/2/2023
 Participant: (Case ID: 10868792)
- Reassessment and/or IEP Due Date Reminder: 10868773 ⌵
 Due Date: 7/2/2023
 Participant: (Case ID: 10868773)
- Case 10870189 has been assigned to you ⌵
 Due Date: 7/4/2023
 Participant: Test Re-enroll-1 (Case ID: 10870189)
- Reassessment and/or IEP Due Date Reminder: 10868794 ⌵
 Due Date: 7/10/2023
 Participant: (Case ID: 10868794)
- Case 10870231 has been assigned to you ⌵
 Due Date: 7/11/2023
 Participant: Scsep-699 Test-023 ga initial notification (Case ID: 10870231)



« < 1 - 5 of 33 »


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.

 CASES
  ADMIN CONSOLE
  MY TASKS
  REPORTS
  GRANTEES



SCSEP 

 All Tasks and Notifications for Edgrantadmin Denk

 Notifications (33)
 

 Show Filters

	SORT	IL	IF
Reassessment and/or IEP Due Date Reminder: 10868792 @ <div> <div>Due Date: 7/2/2023</div> <div>Participant: (Case ID: 10868792)</div> </div>			X
Reassessment and/or IEP Due Date <div> <div>Due Date: 7/2/2023</div> <div>Participant: (Case ID: 10868773)</div> </div>			X
Case 10870189 has been assigned to you @ <div> <div>Due Date: 7/4/2023</div> <div>Participant: Test Re-enroll-1 (Case ID: 10870189)</div> </div>			X
Reassessment and/or IEP Due Date Reminder: 10868794 @ <div> <div>Due Date: 7/10/2023</div> <div>Participant: (Case ID: 10868794)</div> </div>			X
Case 10870231 has been assigned to you @ <div> <div>Due Date: 7/11/2023</div> <div>Participant: Scsep-699 Test-023 ga initial notification (Case ID: 10870231)</div> </div>			X

 < 1 - 5 of 33 > 

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.

CASES
ADMIN CONSOLE
MY TASKS
REPORTS
GRANTEES

SCSEP

All Tasks and Notifications for Edgrantadmin Denk

Notifications (33)

+ Show Filters

	SORT	IF
Reassessment and/or IEP Due Date Reminder: 10868792 Due Date: 7/2/2023 Participant: (Case ID: 10868792)		X
Reassessment and/or IEP Due Date Reminder: 10868773 Due Date: 7/2/2023 Participant: (Case ID: 10868773)		X
Case 10870189 has been assigned to you Due Date: 7/4/2023 Participant: Test Re-enroll-1 (Case ID: 10870189)		X
Reassessment and/or IEP Due Date Reminder: 10868794 Due Date: 7/10/2023 Participant: (Case ID: 10868794)		X
Case 10870231 has been assigned to you Due Date: 7/11/2023 Participant: Scsep-699 Test-023 ga initial notification (Case ID: 10870231)		X

<< 1 - 5 of 33 >>

All Tasks and Notifications for Edgrantadmin Denk

Notifications (33)

Hide Filters

Filters

Notification Type
Select a Notification Type

Due Date From
mm/dd/yyyy

Due Date To
mm/dd/yyyy

Escalated?
☐ Yes ☐ No

RESET

SEARCH

Notifications are listed below the filters in the following format:

10. **[Name of Notification]: [Case ID]**
11. Due Date: [M/D/YYYY]
12. Participant: [Participant Name] (Case ID: [Case ID])

Notification Type
Reassessment

Due Date From
mm/dd/yyyy

Due Date To
mm/dd/yyyy

Escalated?
☐ Yes ☐ No

RESET

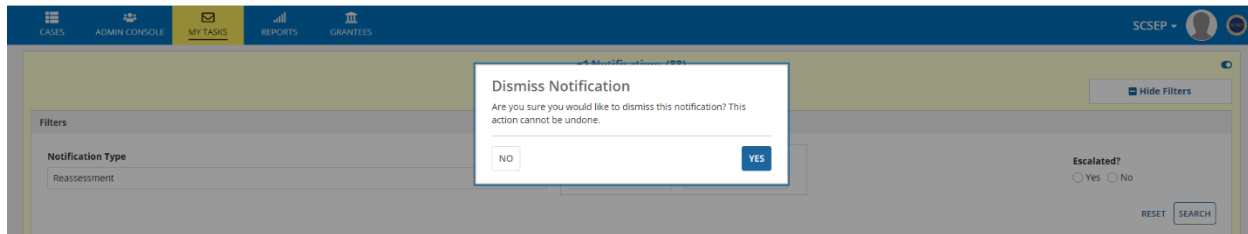
SEARCH

	SORT	IF
Reassessment and/or IEP Due Date Reminder: 10868792 Due Date: 7/2/2023 Participant: (Case ID: 10868792)		X
Reassessment and/or IEP Due Date Reminder: 10868773 Due Date: 7/2/2023 Participant: (Case ID: 10868773)		X
Case 10870189 has been assigned to you Due Date: 7/4/2023 Participant: Test Re-enroll-1 (Case ID: 10870189)		X
Reassessment and/or IEP Due Date Reminder: 10868794 Due Date: 7/10/2023 Participant: (Case ID: 10868794)		X
Case 10870231 has been assigned to you Due Date: 7/11/2023 Participant: Scsep-699 Test-023 ga initial notification (Case ID: 10870231)		X

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**.

[Back](#)
GRANTEES

Grantee Name

Filters

Is Active?
☐ Yes ☐ No

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.

ID	Grantee Name	Is Active?
9002540	Example Grantee	Yes

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

[Back](#)
GRANTEES

ID	Grantee Name	City	State	Is Active?
99000221	District of Columbia	Baltimore test	Wyoming	Yes
99000161	Swap Test #1	Baltimore test	Wyoming	Yes
99000165	Swap Test #3	Baltimore test	Wyoming	Yes

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.

Example Grantee
 MANA

[Summary](#)
[Sub-Grantees](#)
[Related Actions](#)

Grantee Summary

Grantee Name	Grantee Code	National Grantee
Example Grantee	10800	No
Active	Date First Active	Date Last Active
Yes		
Region		

Administrator Info

Username	Name	Work Phone	Fax Number	Email
llynn@bctpartners.com	Lella Lynch			llynn@bctpartners.com
twardbcttest@gmail.com	tward napcam			twardbcttest@gmail.com

Read Only Info

Username	Name	Work Phone	Fax Number	Email
No users are Available				

Durational Limit Policies

Policy ID	Extension Option	Effective Date	Policy Status
There are no 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.

Swap Test #1

Summary **Sub-Grantees** Related Actions

Swap Test #1 Sub-Grantees

Grantee Summary

Grantee Name Swap Test #1

City Baltimore test

State Maryland

Grantee Code 390

Region

Active Yes

National Grantee No

Date First Active 07/01/2020

Date Last Active

Search Sub-Grantees

Org, Name, State, Sub-Grantee Code, or County Name

[Reset](#) [Search](#)

☐ Show Inactive Sub-Grantees

Sub-Grantee Name	Sub-Grantee Code	Effective Date	End Date	State	County of Residence	Status
Swap Sub #1	SS1	8/17/2021	8/17/2022	Maryland	Big Horn County	Active
Swap Sub #2	SS2	8/17/2021	8/17/2022	Maryland	Big Horn County	Active

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.

Swap Test #1

Summary **Sub-Grantees** Related Actions

Swap Test #1 Sub-Grantees

Grantee Summary

Grantee Name Swap Test #1

City Baltimore test

State Maryland

Grantee Code 390

Region

Active Yes

National Grantee No

Date First Active 07/01/2020

Date Last Active

Search Sub-Grantees

Org, Name, State, Sub-Grantee Code, or County Name

[Reset](#) [Search](#)

☐ Show Inactive Sub-Grantees

Sub-Grantee Name	Sub-Grantee Code	Effective Date	End Date	State	County of Residence	Status
Swap Sub #1	SS1	8/17/2021	8/17/2022	Maryland	Big Horn County	Active
Swap Sub #2	SS2	8/17/2021	8/17/2022	Maryland	Big Horn County	Active

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.

Swap Test #1

[Summary](#)[Sub-Grantees](#)[Related Actions](#)

Manage Grants

Manage Grantee's Grants and Sub-Grantees access to them

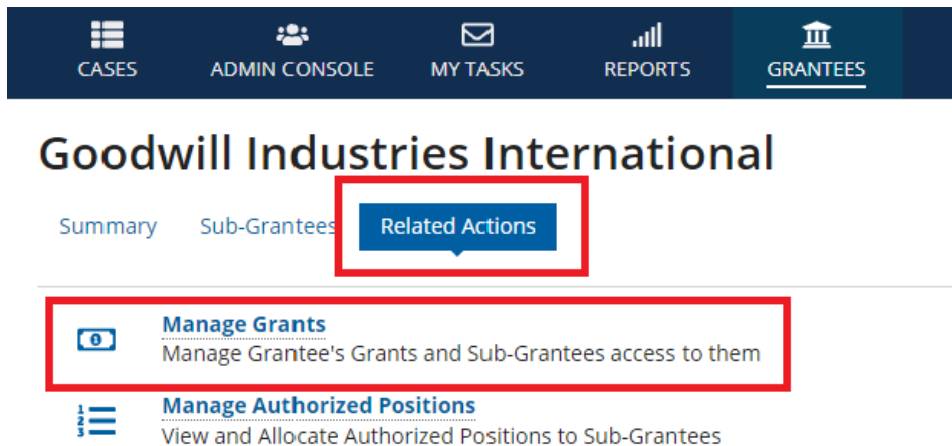


Manage Authorized Positions

View and Allocate Authorized Positions to Sub-Grantees

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.



CASES ADMIN CONSOLE MY TASKS REPORTS GRANTEES

Goodwill Industries International

Summary Sub-Grantees Related Actions

Manage Grants
Manage Grantee's Grants and Sub-Grantees access to them

Manage Authorized Positions
View and Allocate Authorized Positions to Sub-Grantees

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

Goodwill Industries International

 Summary Sub-Grantees **Related Actions**

Manage Grants



Manage Goodwill Industries International Grants

Grantee Summary

Grantee Name
 Goodwill Industries International
Active
 Yes
Region
 region2

Grantee Code
 147
Date First Active

National Grantee
 Yes
Date Last Active

Grant Filters

Program Year
 -- Select a Program Year --

Grants	
Grant Number	Program Year
AD362992160A24	2021

CLOSE

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.

Goodwill Industries International

 Summary Sub-Grantees **Related Actions**

Manage Grants



Manage Goodwill Industries International Grants

Grantee Summary

Grantee Name
 Goodwill Industries International
Active
 Yes
Region
 region2

Grantee Code
 147
Date First Active

National Grantee
 Yes
Date Last Active

Grant Filters

Program Year
 -- Select a Program Year --

Grants	
Grant Number	Program Year
AD362992160A24	2021

CLOSE

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

Goodwill Industries International

 Summary Sub-Grantees **Related Actions**

Manage Grants



Manage Goodwill Industries International Grants

Grantee Summary

 Grantee Name
 Goodwill Industries International
 Active
 Yes
 Region
 region2

 Grantee Code
 147
 Date First Active

 National Grantee
 Yes
 Date Last Active

Grant Filters
Program Year

-- Select a Program Year --

Grants

Grant Number	Program Year
AD162992160A24	2021

CLOSE

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

Edit Grant
Grantee Summary

 Grantee Name
 Swap Test #1
 Grantee Code
 390
 National Grantee
 No

 City
 Baltimore test
 Region
 Date First Active
 07/01/2020

 State
 Maryland
 Active
 Yes
 Date Last Active

Grant Summary

 Grant Number
 AD-36224-21-60-A-2

 Program Year
 2021

ADD SUB-GRANTEE TO GRANT
Search Sub-Grantees

Org. Name, State, Sub-Grantee Code or County Name

Reset Search

Linked Sub-Grantees

Select an Action SUBMIT

Grant Access Grid

<input type="checkbox"/> Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/> Swap Sub #1	SS1	Maryland	Sub-Grantee	Active
<input type="checkbox"/> Swap Sub #2	SS2	Maryland	Sub-Grantee	Active
<input type="checkbox"/> Swap Test #1	390	Maryland	Grantee	Inactive

CLOSE

Click **ADD NEW**.

Swap Test #1

 Summary Sub-Grantees **Related Actions**
ADD Sub-Grantees To Grant
Grantee Summary

 Grantee Name
 Swap Test #1
 Grantee Code
 390
 National Grantee
 No

 City
 Baltimore test
 Region
 Date First Active
 07/01/2020

 State
 Maryland
 Active
 Yes
 Date Last Active

Grant Summary

 Grant Number
 AD-36224-21-60-A-2

 Program Year
 2021

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
No Grant Access is Available				

ADD NEW

CANCEL

SUBMIT

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

Swap Test #1

Summary Sub-Grantees **Related Actions**

ADD Sub-Grantees To Grant

Grantee Summary

Grantee Name: Swap Test #1 City: Baltimore test State: Maryland
 Grantee Code: 390 Region: Active: Yes
 National Grantee: No Date First Active: 07/01/2020 Date Last Active:

Grant Summary

Grant Number: AD-36224-21-60-A-2 Program Year: 2021

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
<input type="text" value="Start typing Sub-Grantee's Name to pick from available options"/>				

ADD NEW

CANCEL

SUBMIT

Swap Test #1

Summary Sub-Grantees **Related Actions**

ADD Sub-Grantees To Grant

Grantee Summary

Grantee Name: Swap Test #1 City: Baltimore test State: Maryland
 Grantee Code: 390 Region: Active: Yes
 National Grantee: No Date First Active: 07/01/2020 Date Last Active:

Grant Summary

Grant Number: AD-36224-21-60-A-2 Program Year: 2021

Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
<input type="text" value="Start typing Sub-Grantee's Name to pick from available options"/>				
Swap Sub #1				
Swap Sub #2				

CANCEL

SUBMIT

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.

Edit Grant

Grantee Summary

Grantee Name: Swap Test #1 City: Baltimore test State: Maryland
 Grantee Code: 390 Region: Active: Yes
 National Grantee: No Date First Active: 07/01/2020 Date Last Active:

Grant Summary

Grant Number: AD-36224-21-60-A-2 Program Year: 2021

ADD SUB-GRANTEE TO GRANT

Search Sub-Grantees

Reset Search

Linked Sub-Grantees

Select an Action SUBMIT

Grant Access Grid

<input type="checkbox"/>	Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input checked="" type="checkbox"/>	Swap Sub #1	SS1	Maryland	Sub-Grantee	Active
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland	Sub-Grantee	Active
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland	Sub-Grantee	Active
<input type="checkbox"/>	Swap Test #1	390	Maryland	Grantee	Inactive

CLOSE

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

Edit Grant

Grantee Summary

Grantee Name

 Swap Test #1

City

 Baltimore test

State

 Maryland

Grantee Code

 390

Region

Active

 Yes

National Grantee

 No

Date First Active

 07/01/2020

Date Last Active

Grant Summary

Grant Number

 AD-36224-21-60-A-2

Program Year

 2021

ADD SUB-GRANTEE TO GRANT

Search Sub-Grantees

Org. Name, State, Sub-Grantee Code, or County Name

Reset Search

Linked Sub-Grantees

Remove From Grant

SUBMIT

Select an Action

Remove From Grant

	Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/>	Sub-Grantee				
<input type="checkbox"/>	Swap Sub #1	SS1	Maryland	Sub-Grantee	Active
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland	Sub-Grantee	Active
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland	Sub-Grantee	Active
<input checked="" type="checkbox"/>	Swap Test #1	390	Maryland	Grantee	Inactive

CLOSE

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.

Swap Test #1

Summary

Sub-Grantees

Related Actions

Edit Grant

Grantee Summary

Grantee Name

 Swap Test #1

City

 Baltimore test

State

 Maryland

Grantee Code

 390

Region

Active

 Yes

National Grantee

 No

Date First Active

 07/01/2020

Date Last Active

Grant Summary

Grant Number

 AD-36224-21-60-A-2

Program Year

 2021

ADD SUB-GRANTEE TO GRANT

Search Sub-Grantees

Org. Name, State, Sub-Grantee Code, or County Name

Reset Search

Are you sure that you want to remove the selected Sub-Grantee(s) from this Grant?

NO

YES

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.

GRANTEES

GRANTEES

SUB-GRANTEES

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

SUB-GRANTEES			
<div> <div>Sub-Grantee Name</div> <div>Search by Sub-Grantee Name</div> <div>SEARCH</div> </div>			
<div> <div>Filters</div> <div> <div>Is Active?</div> <div> <input type="radio"/> Yes <input type="radio"/> No </div> </div> </div>			
<div> <div>RESET</div> <div>SEARCH</div> </div>			
ID	Sub-Grantee Name		Is Active?
1869	101 N101		Yes
1790	102 N102		Yes
1823	102 N1021		Yes
1846	103 N103		Yes
1852	104 N104		Yes
1967	AARP Foundation		Yes
1970	AARP Foundation SCSEP - Phoenix, AZ		Yes
765	AARP Foundation SCSEP Albuquerque, NM (old grant)		Yes
767	AARP Foundation SCSEP Ancebo, PR (old grant)		Yes
1277	AARP Foundation SCSEP Atlanta, GA		Yes

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

SUB-GRANTEES			
<div> <div>Search by Sub-Grantee Name</div> <div>SEARCH</div> </div>			
<div> <div>Filters</div> <div> <div>City</div> <div>Search by City</div> </div> <div> <div>Is Active?</div> <div> <input type="radio"/> Yes <input type="radio"/> No </div> </div> </div>			
<div> <div>RESET</div> <div>SEARCH</div> </div>			
ID	Sub-Grantee Name	City	Is Active?
99000241	DC Subgrantee	Baltimore test	Yes
99000162	Swap Sub #1	Baltimore test	Yes
99000164	Swap Sub #2	Baltimore test	Yes
99000166	Swap Sub 3-1	Baltimore test	Yes
99000167	Swap Sub 3-2	Baltimore test	Yes

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

DC Subgrantee

Summary Related Actions

Sub-Grantee Summary

Sub-Grantee Name DC Subgrantee
 Sub-Grantee Code DC001
 Date First Active 04/08/2021

City Baltimore test
 Region
 Date Last Active

State Maryland
 Active Yes

Administrator Info

There is no active administrator for this organization.