



# **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**

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## DOCUMENT INFORMATION

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

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## 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"><li>• Entering and managing safety consultation and assessment information.</li><li>• Management of eligibility approval process.</li><li>• Entering and managing organization and contact information.</li><li>• Guidance on the generation of Internal Quarterly Progress Reports (QPR).</li><li>• Generation of Management Reports.</li></ul> <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Authorized by the **Older Americans Act (OAA)**, originally enacted in 1965, the **Senior Community Service Employment Program (SCSEP)** (sometimes referred to as Title V), funded and administered by the **Employment and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: 1<sup>st</sup> quarter (Jul-Sept), 2<sup>nd</sup> quarter (Oct-Dec), 3<sup>rd</sup> quarter (Jan-Mar), 4<sup>th</sup> 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](https://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
<b>User Management</b>	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.
<b>Case Management</b>	Allows users to add, update, track, and delete Cases through the completion of their workflow.
<b>Eligibility Verification</b>	Allows users to ensure that Participants meet the Eligibility requirements.
<b>Services Management</b>	Allows users to add, update, delete, and track services, including program required services, supportive services, and paid training provided to participants.
<b>Outcome Management</b>	Allows users to add, update, delete, and track Participant outcomes.
<b>Exit Management</b>	Allows users to Exit participants based on pre-defined requirements.

Functional Area	Description
<b>Follow-Up Management</b>	Allows users to add, edit, delete, and track follow-up services provided to program participants.
<b>Reporting</b>	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

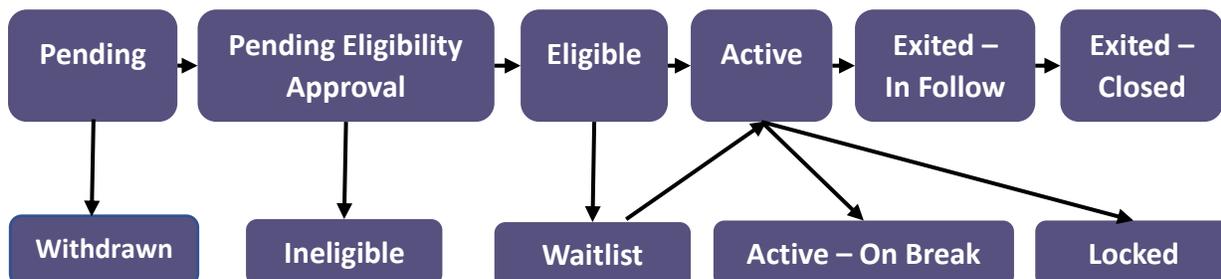
Within the **SCSEP GPMS**, the following **User Roles** are identified:

Role Name	Abilities
<b>Case Manager</b>	<ul style="list-style-type: none"> <li>Primary users who move the <b>Case</b> through the <b>Intake, Eligibility, Service, Exit, and Outcome</b> milestones.</li> <li>Ability to add, edit, and read throughout the system.</li> <li>Ability to create new <b>Cases</b> for their organization and to update the details of those <b>Cases</b> assigned to them.</li> <li>Not permitted to submit <b>Quarterly Progress Reports (QPRs)</b>.</li> </ul>
<b>Case Supervisor</b>	<ul style="list-style-type: none"> <li>Users with all <b>Case Manager</b> privileges plus the ability to reassign <b>Cases</b> and <b>Case Managers</b>.</li> <li>Ability to create <b>Users</b> with any role except <b>Grantee or Sub-Grantee Administrator</b>. Ability to assign/reassign cases to <b>Case Managers</b>.</li> <li>Ability to add, edit, delete, and read throughout the system.</li> <li>Ability to review and approve eligibility determination.</li> <li>Ability to request re-certification of a <b>Case</b>.</li> <li>Not permitted to submit <b>QPRs</b>.</li> </ul>
<b>Sub-Grantee Administrator</b>	<ul style="list-style-type: none"> <li>Users with all the privileges of a <b>Case Manager</b> (see above) with the ability to review/edit <b>Case-related</b> information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move <b>Cases</b>; to approve re-certifications requested by the <b>Case Supervisor</b>; and to submit <b>QPRs</b>.</li> <li><b>Sub-Grantee Administrators</b> inherit all permission of the <b>Case Supervisor</b> along with the ability to manage the set of users that have access within their sub-grant.</li> <li>Ability to create <b>Users</b> with any role except another <b>Sub-Grantee Administrator or Grantee Administrator</b>.</li> <li>Ability to assign/reassign cases to <b>Case Managers</b>.</li> </ul>
<b>Grantee Administrator</b>	<ul style="list-style-type: none"> <li>Users with all the privileges of a <b>Case Manager</b> (see above) and above can review/edit <b>Case-related</b> information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move <b>Cases</b>; to approve re-certifications requested by the <b>Case Supervisor</b>; and to submit <b>QPRs</b>.</li> <li><b>Grantee Administrators</b> inherit all permission of the <b>Case Supervisor</b> along with the ability to manage the set of users that have access within their grant.</li> <li>Ability to create <b>Users</b> with any role except another <b>Grantee Administrator</b>. Ability to assign/reassign cases to <b>Case Managers</b>.</li> </ul>
<b>Program Analyst</b>	<ul style="list-style-type: none"> <li><b>Program Analysts</b> are those users located within the <b>National Program Office</b>.</li> <li>Ability to add <b>Grantee Administrators</b>.</li> </ul>

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

## 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
<b>Pending</b>	<p><b>Case</b> has not been submitted for <b>eligibility determination</b>.</p> <p><b>Case Status</b> is updated to <b>Pending</b> when the <b>Case Manager</b> has completed the <b>Case</b> creation process, but the <b>Participant</b> has not been moved through all the <b>Intake</b> process steps.</p>
<b>Withdrawn</b>	<p><b>Case</b> has not been submitted for eligibility determination and user has selected Withdraw from the related actions screen.</p>
<b>Pending Eligibility Approval</b>	<p>An <b>Eligibility</b> determination decision has not been made.</p> <p>A <b>Task</b> for <b>eligibility approval</b> has been created by the <b>User</b> (and sent to the <b>Case Supervisor</b>), but eligibility <u>has not been approved</u>.</p>
<b>Eligible</b>	<p><b>Case Status</b> is updated to <b>Eligible</b> when an <b>Eligibility</b> approval has been granted by the <b>Case Supervisor</b>.</p>
<b>Ineligible</b>	<p><b>Case Status</b> is updated to <b>Ineligible</b> if the <b>Case Supervisor</b> deems the <b>Case</b> to be disqualified due to specific program requirements.</p>

Status	Description
<b>Waitlist</b>	When the <b>Case</b> is determined to be <b>Eligible</b> , the <b>Case</b> is placed on a <b>Waitlist</b> until a <b>Community Service Assignment</b> is available.
<b>Active</b>	<b>Case Status</b> is updated to <b>Active</b> after <b>Eligibility</b> has been approved by the <b>Case Supervisor</b> , the <b>Program Orientation Date</b> has been added, and an <b>Assignment</b> has been added, meaning the <b>Case</b> has been assigned to a <b>Host Agency</b> for a <b>Community Service Assignment</b> .
<b>Active – On Break</b>	An active <b>Case</b> has a <b>Break in Service</b> where the system date is between the <b>Break Start Date</b> and the <b>Break End Date</b> .
<b>Locked</b>	A <b>Case</b> has been locked for exceeding the <b>Durational Limit</b> .
<b>Exited – In Follow-Up</b>	A <b>Case</b> has been <b>Exited</b> for <u>unsubsidized employment</u> and has a <b>Placement</b> associated with it. <b>Follow-Up</b> is only relevant for Enrollments that have a <b>Placement</b> . When <b>Case Status</b> is <b>Exited – In Follow-Up</b> , access is limited to the <b>Summary, Services, Outcomes, Follow-ups, and Related Actions</b> .
<b>Exited – Closed</b>	A <b>Case</b> has been <b>Exited</b> 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
<b>Tabs</b>	A sequence of identifiers across the top of the screen that provide a <b>Menu</b> of options.
<b>Navigation Buttons</b>	A sequence of buttons at the bottom of the page to navigate the user from page to page.
<b>Dropdown Lists</b>	Provide a list of allowable values for the field, thereby limiting the selection.
<b>Field-Level Help</b>	Alert the user to the nature of the data to be entered for various fields.
<b>Required Fields</b>	An asterisk (*) directly next to a field label is used to identify fields where mandatory information is required to proceed.
<b>Calendar Buttons</b>	A calendar format is provided to select a date.
<b>Upload Documents</b>	A button used to begin the attachment of an external document to the <b>Case</b> .
<b>Error &amp; Warning Messages</b>	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.

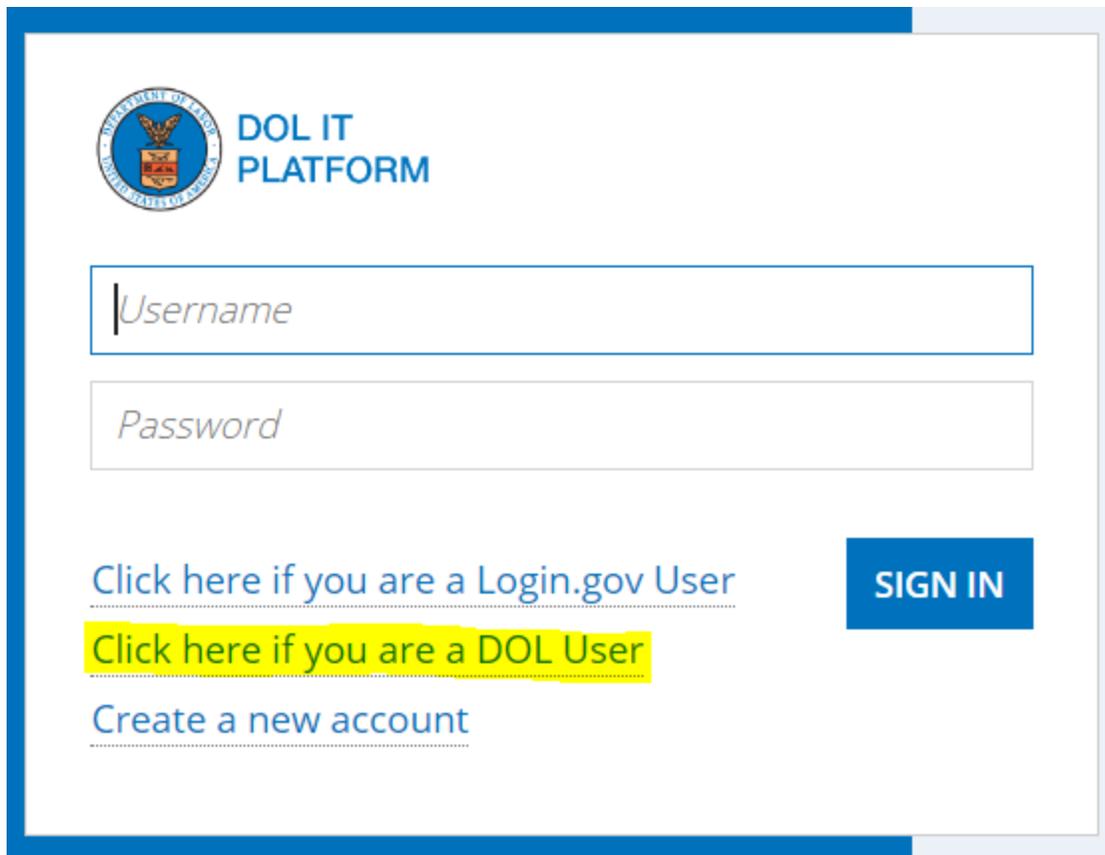
USE OF THIS SYSTEM BY ANY USER AUTHORIZED OR UNAUTHORIZED CONSTITUTES A CONSENT TO THIS MONITORING, RECORDING, DISCLOSURE, AND ACCEPTS THAT USE OF THE SYSTEM IS SUBJECT TO AUDIT BY AUTHORIZED PERSONNEL.

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 fields 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.

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)*

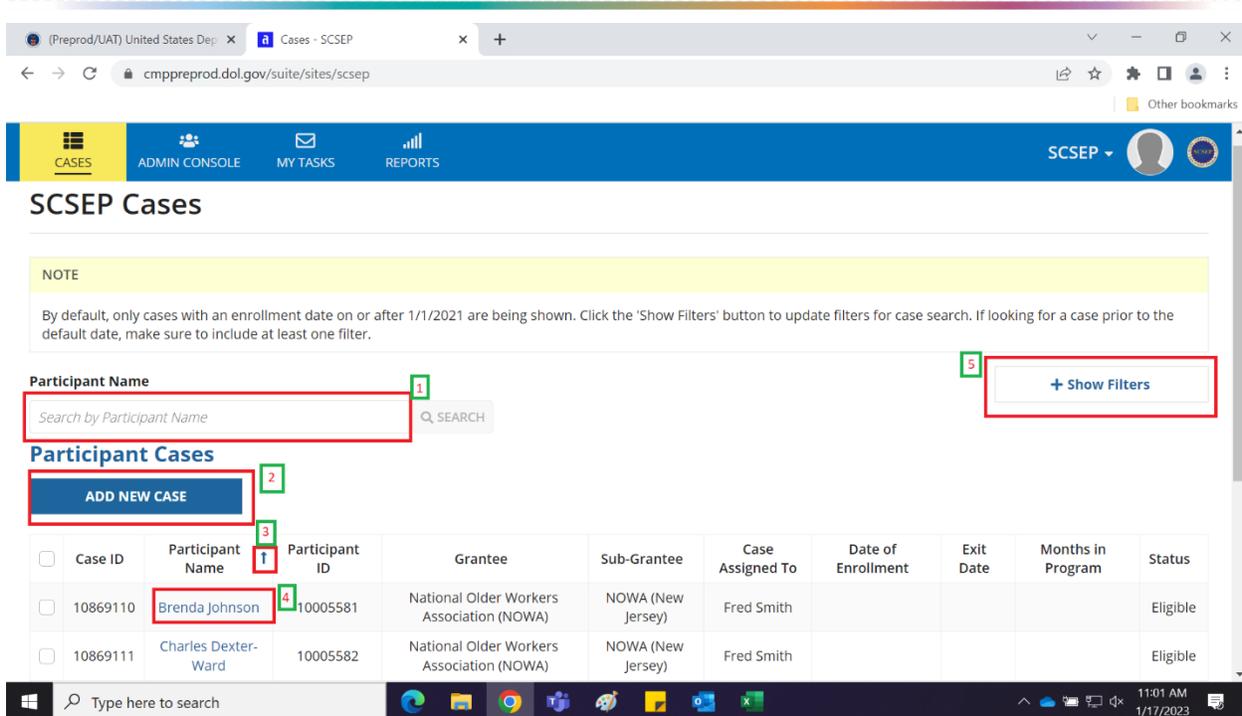
The **CASES** tab brings the user to the **SCSEP Cases** screen. The **SCSEP Cases** screen displays a grid of SCSEP participant cases currently or previously enrolled within the user's grantee(s) and sub-grantee(s).

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 5 [+ Show Filters](#)

Search by Participant Name  SEARCH

**Participant Cases** 2

[ADD NEW CASE](#) 3

<input type="checkbox"/>	Case ID	Participant Name <span>4</span>	Participant ID <span>3</span>	Grantee	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
<input type="checkbox"/>	10869110	Brenda Johnson	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

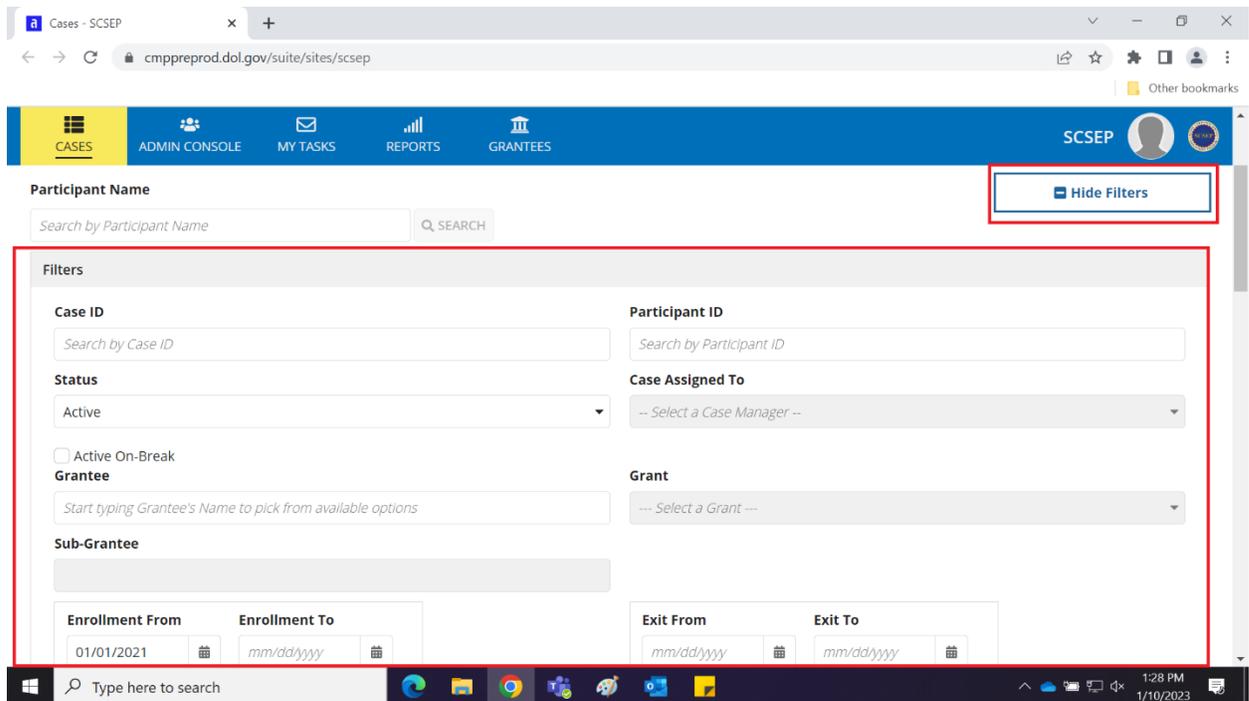
Each of the functionalities available under the *CASES* tab will be discussed in the sections related to the case entry and development/handling process.

1. **Search** – The **Participant Name** search allows the user to search all participants based on any part of the Participant Name.
2. **Add New Case** – The **ADD NEW CASE** button allows the user to begin the process of entering a new case for a new or existing participant into the system.
3. **Sort Arrows** – The sorting arrows (↑ – ascending and ↓ – descending) can be used to sort the participant cases in the desired order.
4. **Participant Name** – The **Participant Name** link can be used to immediately open the record for display and editing.
5. **Filters** – the **Show Filters** link allows the user to specify a range of possible items with which to limit the displayed cases within the grid (the default is to display all).

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

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

- Enrollment Date From – User can select cases where the enrollment date is on or after the entered date.
- Enrollment Date To – User can select cases where the enrollment date is on or before the entered date.
- Exit Date From – User can select cases where the exit date is on or after the entered date.
- Exit Date To – User can select cases where the exit date is on or before the entered date.



## 1. Add New Case

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

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

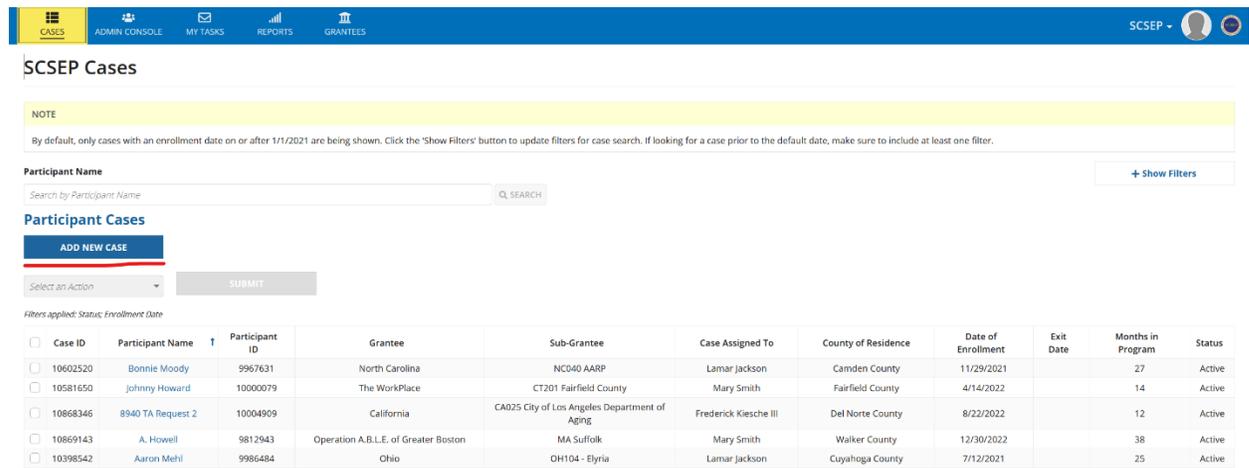
Some fields provide additional information regarding how they are populated. In these cases, the hyperlinked text **Show Detailed Instructions** displays below the field. When clicked, a text box displays additional information regarding the field. The text will also change to **Hide Instructions**.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

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

## 1.1 Intake

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

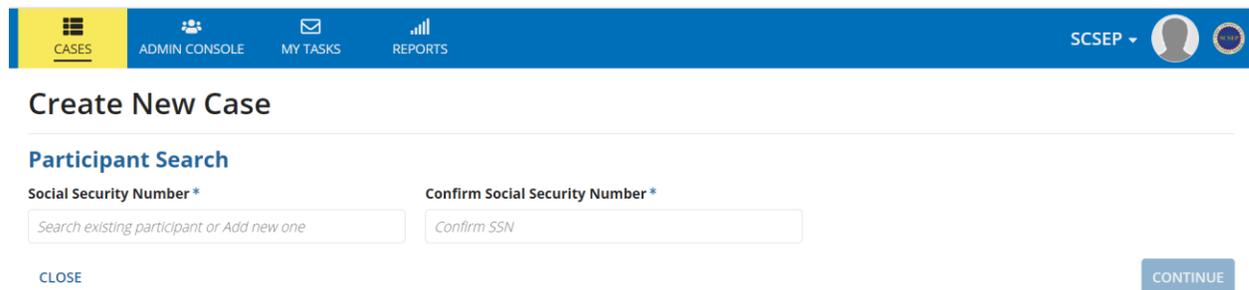
1. To add a new participant or a new case for an existing participant, click on **ADD NEW CASE**.



The screenshot shows the SCSEP Cases dashboard. At the top, there is a navigation bar with 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS', and 'GRANTEES'. Below the navigation bar, the page title is 'SCSEP Cases'. A note states: '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.' Below the note, there is a search bar for 'Participant Name' and a '+ Show Filters' button. Underneath, there is a 'Participant Cases' section with an 'ADD NEW CASE' button and a 'SUBMIT' button. A table of cases is displayed below, with columns for Case ID, Participant Name, Participant ID, Grantee, Sub-Grantee, Case Assigned To, County of Residence, Date of Enrollment, Exit Date, Months in Program, and Status.

Case ID	Participant Name	Participant ID	Grantee	Sub-Grantee	Case Assigned To	County of Residence	Date of Enrollment	Exit Date	Months in Program	Status
10602520	Bonnie Moody	9967631	North Carolina	NC040 AARP	Lamar Jackson	Camden County	11/29/2021		27	Active
10581650	Johnny Howard	1000079	The WorkPlace	CT201 Fairfield County	Mary Smith	Fairfield County	4/14/2022		14	Active
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
10869143	A. Howell	9812943	Operation A.B.L.E. of Greater Boston	MA Suffolk	Mary Smith	Walker County	12/30/2022		38	Active
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.



The screenshot shows the 'Create New Case' screen. At the top, there is a navigation bar with 'CASES', 'ADMIN CONSOLE', 'MY TASKS', and 'REPORTS'. Below the navigation bar, the page title is 'Create New Case'. Underneath, there is a 'Participant Search' section with two input fields: 'Social Security Number\*' and 'Confirm Social Security Number\*'. The 'Social Security Number\*' field has a placeholder text 'Search existing participant or Add new one'. The 'Confirm Social Security Number\*' field has a placeholder text 'Confirm SSN'. Below the input fields, there are 'CLOSE' and 'CONTINUE' buttons.

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 \*

[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
<b>Case Details</b>			
<b>Grantee *</b> --Select a Grantee--	<b>Sub-Grantee *</b> --Select a Sub-Grantee--		
<b>Grant *</b> --- Select a Grant ---	<b>Case Assigned To *</b> -- Select a Case Manager --		
<b>Application Date *</b> mm/dd/yyyy			
<b>Participant Information</b>			
<b>Social Security Number</b> XXX-XX-XXXX	<b>Primary Phone *</b>	<input type="text"/>	<input type="checkbox"/> Cell?
<b>First Name *</b> Adrian	<b>Alternate Phone</b>	<input type="text"/>	<input type="checkbox"/> Cell?
<b>Middle Initial</b> A	<b>Email</b>	<input type="text" value="yourname@domain.com"/>	
<b>Last Name *</b> Allweather	<b>Employment Status</b>	--Select Employment Status--	
<b>Date of Birth</b> 01/01/1950	<b>Adequate Connectivity</b>	<b>Adequate Device</b>	
<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	

### ▼ 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



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

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

- 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.
- 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

- 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

<b>Contact Name</b>			<b>Relationship to Participant</b>		
<input type="text"/>			<input type="text"/>		
<b>Address Line 1</b>			<b>Primary Phone</b>		
<input type="text"/>			<input type="text"/>		
<b>Address Line 2</b>			<b>Alternate Phone</b>		
<input type="text"/>			<input type="text"/>		
<b>City</b>	<b>State</b>	<b>Zip</b>	<b>Email</b>		
<input type="text"/>	<input type="text" value="--- Select a State ---"/>	<input type="text"/>	<input type="text" value="yourname@domain.com"/>		

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

<b>Gender</b>	<b>Did Participant Identify Race?</b>	<b>Nationality</b>
<input type="text" value="Male"/>	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text" value="Filipino"/>
<b>Ethnicity Hispanic / Latino?</b>	<b>Race</b>	
<input type="radio"/> Yes	<input type="checkbox"/> American Indian or Alaskan Native	
<input checked="" type="radio"/> No	<input type="checkbox"/> Native Hawaiian or Other Pacific Islander	
<input type="radio"/> Participant did not self-identify	<input checked="" type="checkbox"/> Asian	
	<input type="checkbox"/> Black / African American	
	<input type="checkbox"/> White	
	Select all that apply	

CLOSE

SAVE + CONTINUE

SAVE + CLOSE

10. Click on one of the navigation buttons at the bottom of the screen:
  - i. **CLOSE** opens a pop-up window to confirm the case will close.
  - ii. Click **NO** to return to the **Intake** screen.
  - iii. Click **YES** to end the case creation and return to the **SCSEP Cases** screen. Note that information entered 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

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

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

#### 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.

NO

YES

- 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?

NO

YES

### 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

**Total Includable Family Income**  
 12 month  
 6 month

**Applicant Certification**  
 Did the applicant sign the Applicant Certification?  
 Yes  
 No

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

**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

**Case Manager:**

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

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

**Participant Summary**

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

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**

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

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

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

**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	<b>Characteristics</b>	Other Enrollment Information
--------	-------------	------------------------	------------------------------

### Participant Summary

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

### Priority of Service

⚠ 'Formerly Incarcerated?' is blank

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

### Most In Need Waiver Factors

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



### Homeless

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

#### Homeless \*

 Yes  
 No

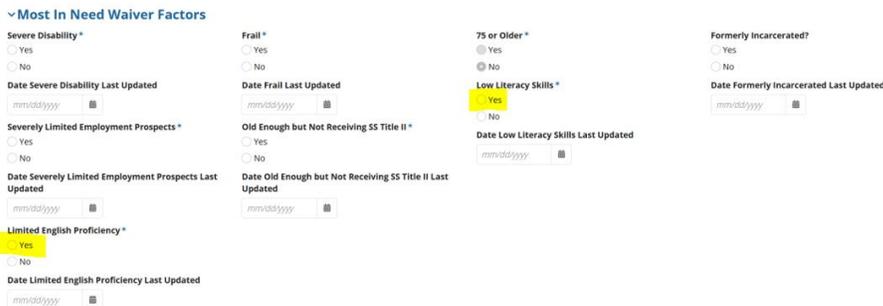
[\(Show Detailed Instructions\)](#)

#### 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.



### 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**

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 \***

**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

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

**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 Interest Job Code

### Job Codes

### Comments

0 / 2000

## Program Introduction

### Pre-Assessment Date

### Program Overview Date

[PREVIOUS](#) [CLOSE](#)

[COMPLETE](#)

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

## 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	

## 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

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

#### 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

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

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

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

### 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 King Denise King
9954788	Robert Healy School		3010 South Parnell Avenue, Chicago, Illinois 60616	

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

SELECT ORGANIZATION

ADD NEW HOST AGENCY

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 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**

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

Add New

<b>Host Agency Agreement Date</b> mm/dd/yyyy	<b>Host Agency Monitoring Visit Date</b> 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      Alternate Extension

      Cell?     

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**

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

**Assignment Details**

Assignment Date \*      **Host Agency \***

01/01/2020      Franklin Park Internet Cafe ✕

Assignment Start Date      Site Name and Location      Assigned To \*

mm/dd/yyyy      Franklin Park Research Park       Grantee or sub-recipient/ local project  
 Workforce Partner

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

**Assignment Date\***  
01/01/2020

**Assignment Start Date**  
mm/dd/yyyy

**Assignment End Date**  
mm/dd/yyyy

**Job Code**  
Please select a Job Code

**Workers' Comp Code**

**Host Agency\***  
Franklin Park Internet Cafe

**Site Name and Location**  
Franklin Park Research Park

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

**Survey Contact ?\***  
Haring, Rachel

[+] New Survey Contact

**Supervisor**  
Please select a Supervisor

Select only if Supervisor is different than Contact

**Supervisor Funding Source Type**  
 Federal  
 Non-federal  
 Non-Federal

**Participant's Schedule**

0 / 2000

**CSA Code Type\***  
 General  
 Elderly

**CSA Code\***  
E1. Project Administration

**CSA Title**

**Starting Wage per Hour\***  
\$15.00

**Hours per week\***  
40

**Comments ?**

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**

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

**Assignments**

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

### Assignment Details

[Edit](#)

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

### 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

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

### General Details

**Assignment\***

Assignment Date - 01/01/2020

**Category\*** **Type\***

Pick a category Pick a category

### Service Details

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

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

**Is this a One Day Service?\***

Yes  No

**Comments**

0 / 2000

**Additional Fields**

Service Provider

<b>State</b>	<b>City</b>	<b>Organization Name</b>
Select a State		
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**

**Supportive Service Provided By\***

Grantee or sub-recipient/local project

Workforce partner

Other

Both i and ii

Both i and iii

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

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

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

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

### Participant Summary

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

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

## 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

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

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

<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>
Belinda Chesterfield	CMS010005588	New Jersey	10869117
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>
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

<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>
Belinda Chesterfield	CMS010005588	New Jersey	10869117
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>
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](#)

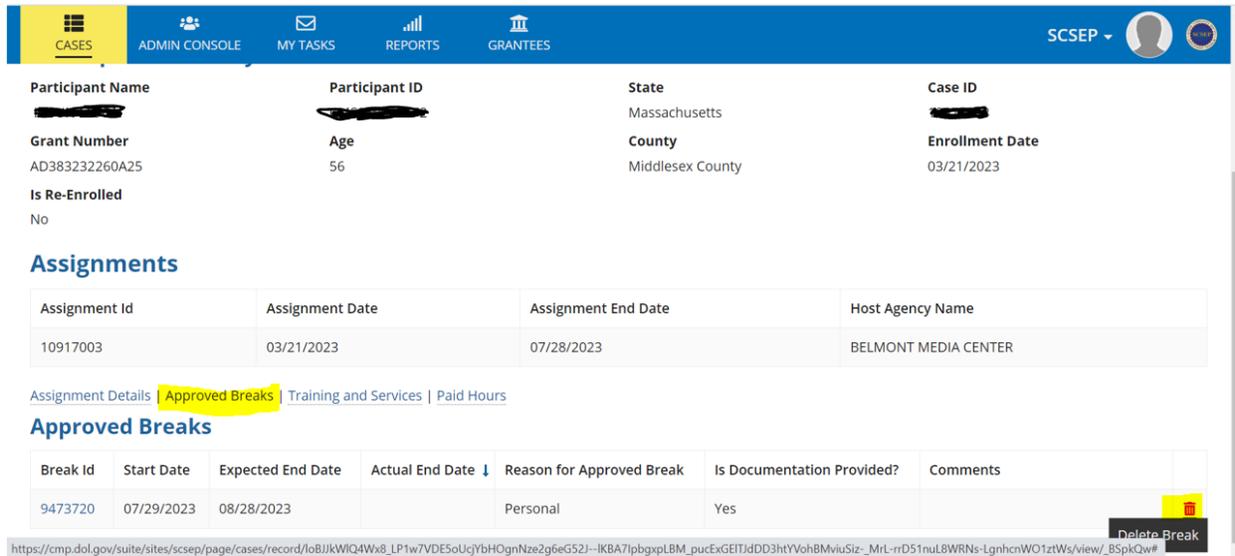
### Approved Breaks

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 is a navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS, and GRANTEES. The user is logged in as SCSEP. Below the navigation bar, there is a participant profile card for a participant in Massachusetts, Middlesex County, with an enrollment date of 03/21/2023. The participant is not re-enrolled. Below the profile card, there is a section for Assignments, showing one assignment with ID 10917003, dated 03/21/2023, ending on 07/28/2023, at the BELMONT MEDIA CENTER. Below the assignments, there is a section for Approved Breaks, showing one break with ID 9473720, starting on 07/29/2023, ending on 08/28/2023, for a personal reason, with documentation provided. A 'Delete Break' button 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

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

#### Participant Summary

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

#### Assignments

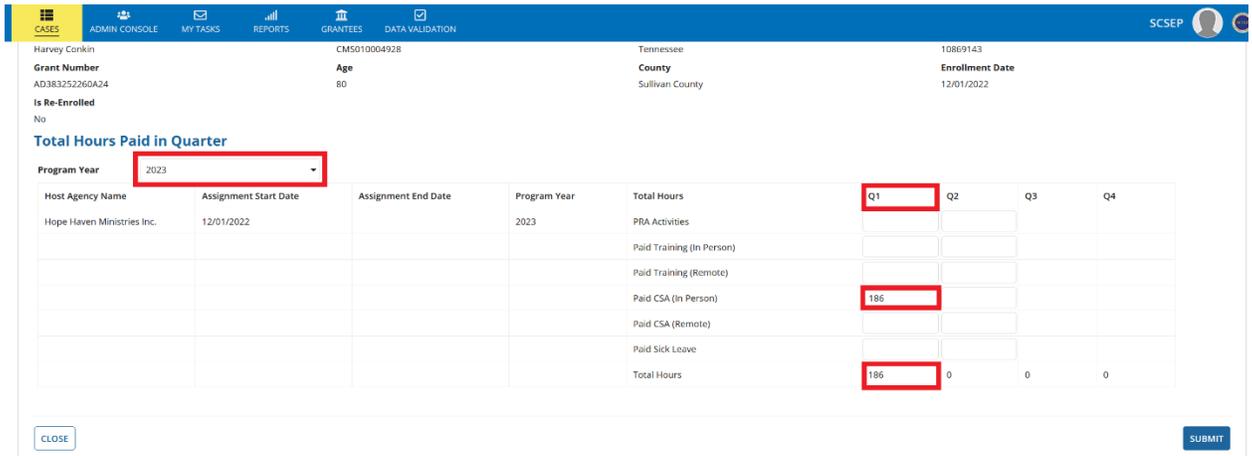
Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
11849740	01/01/2020		Franklin Park Internet Cafe

**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.

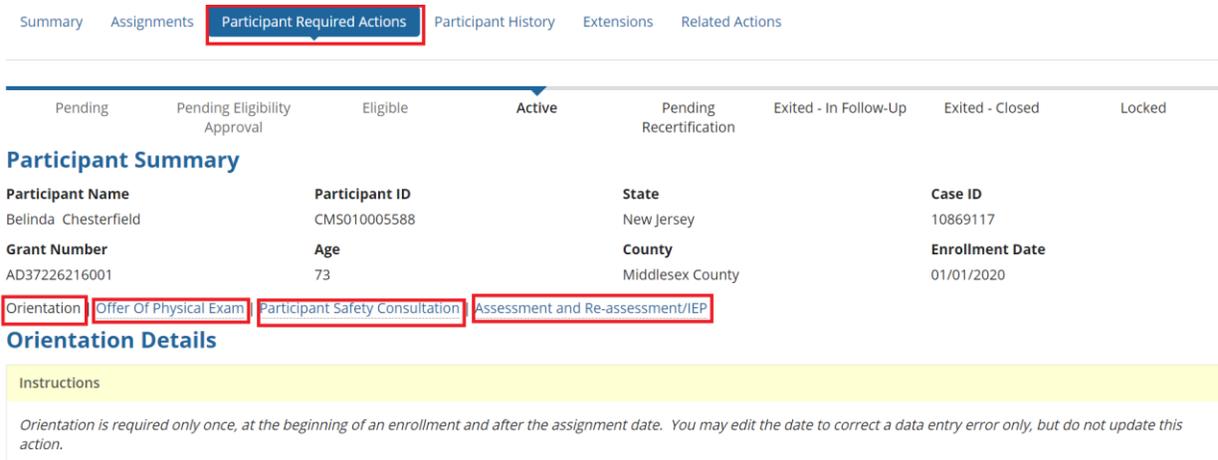
Click **Submit** to save the data entered.



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				
				<b>Total Hours</b>	186	0	0	0

## 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**

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

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

**Orientation Details**

Instructions

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

Orientation Date *	Provided By *
No Orientation data available	
<a href="#">Add New</a>	

## 6.1 Orientation Details

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

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

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

### Orientation Details

#### Instructions

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

Orientation Date *	Provided By *
No Orientation data available	
<a href="#">Add New</a>	

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

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

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

### Orientation Details

<b>Instructions</b>	
<i>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.</i>	
<b>Orientation Date *</b>	<b>Provided By *</b>
01/01/2020	Somerset County Seniors  

## 6.2 Offer of Physical Exam

### Participant Summary

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

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

### Physical Exam Details

<b>Instructions</b>		
<i>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.</i>		
<b>Date of Offer of Physical Exam * ?</b>	<b>Declined Offer of Physical Exam * ?</b>	<b>Provided By * ?</b>
No Offer Of Physical Exam data available		
<a href="#">Add New</a>		

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

<b>Instructions</b>		
<i>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.</i>		
<b>Date of Offer of Physical Exam * ?</b>	<b>Declined Offer of Physical Exam * ?</b>	<b>Provided By * ?</b>
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	
<span style="border: 1px solid red; padding: 2px;">➕ Add New</span>	

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
<span style="border: 1px solid red; padding: 2px;">📄</span> <span style="border: 1px solid red; padding: 2px;">🗑️</span>	

### 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				
<span style="border: 1px solid red; padding: 2px;">➕ Add New</span>				

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.*

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

## 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
<b>Participant Summary</b>							
<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>				
Charles Dexter-Ward	CMS010005582	New Jersey	10869111				
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>		<b>Date of Program Exit</b>		
AD37226216001	73	Middlesex County	01/01/2020		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
<b>Edit Case</b>	X	X	X	X	X	X		X		X	X
<b>Withdrawn</b>	X	X	X		X			X			
<b>Add to Waitlist</b>			X								
<b>Manage Physical Exam</b>						X					
<b>Manage Paid Hours</b>						X	X			X	X
<b>Move Case</b>						X	X				
<b>Transfer Case</b>						X	X				
<b>Add Participant Required Action</b>						X				X	X
<b>Recertify Case</b>						X	X				
<b>Manage Program Introduction</b>			X				X				
<b>Manage Assignments</b>						X		X		X	X
<b>Add Service</b>						X					X
<b>Manage Training and Services</b>						X					X
<b>Manage Breaks in Service</b>						X					X
<b>Manage Waiver Factors</b>	X	X	X			X	X				
<b>Manage Extensions</b>					X		X	X			
<b>Add Exit</b>							X	X			
<b>Modify Exit</b>										X	X
<b>Manage/Add Placements</b>											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.

## Manage Waiver Factors

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

### Participant Summary

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

<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>
Belinda Chesterfield	CMS010005588	New Jersey	10869117
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>
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

<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>
Belinda Chesterfield	CMS010005588	New Jersey	10869117
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>
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 

**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

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

#### Exit Information

**Exit Comments**

90-Day Date
 Deceased after exit?

### Waiver Certification

#### Waiver of Confidentiality\*

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

CANCEL EXIT

SUBMIT AND CLOSE

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

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

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

### Exit Information

<b>Category of Exit*</b> Unsubsidized Employment	<b>Exit Date*</b> 03/01/2022
<b>Unsubsidized Employment Type*</b> <input type="radio"/> Regular Employment <input type="radio"/> Self-Employment	<b>Exit Comments</b> <div style="border: 1px solid #ccc; height: 100px;"></div>

90-Day Date 5/30/2022

Deceased after exit?

### Waiver Certification

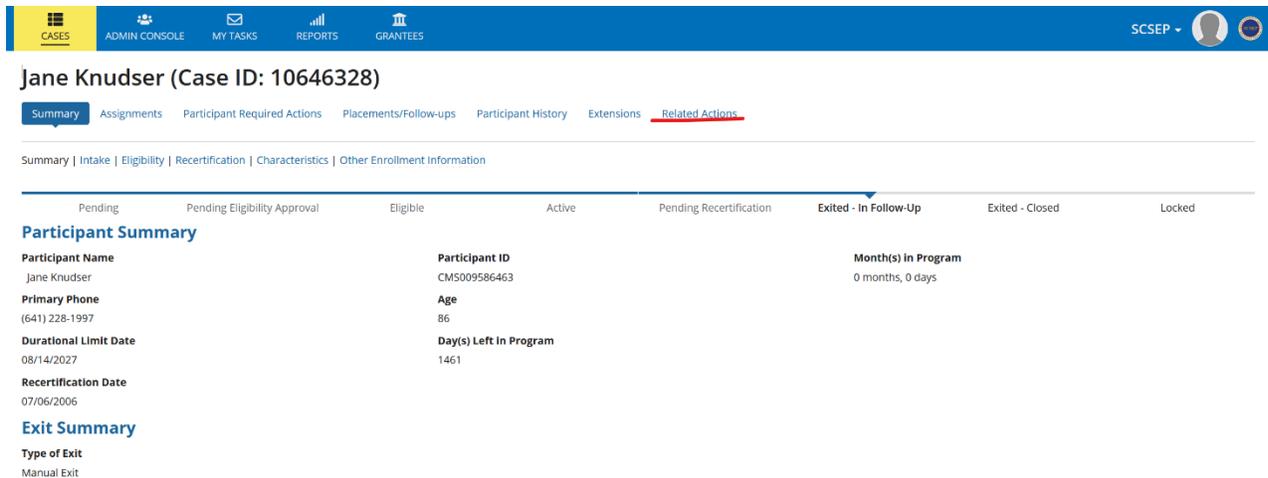
#### Waiver of Confidentiality\*

- 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.



**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

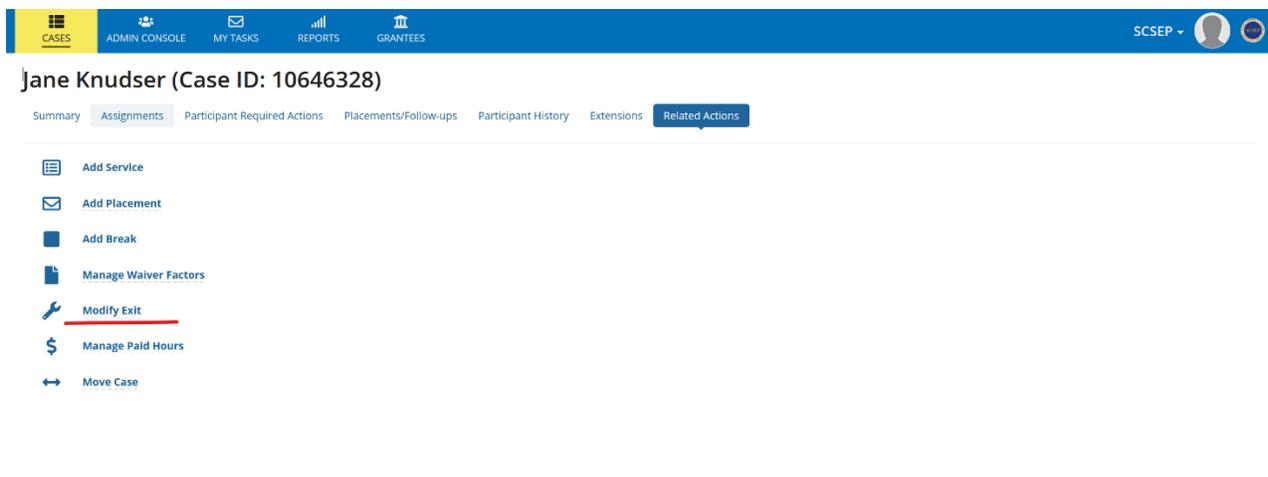
Pending | Pending Eligibility Approval | Eligible | Active | Pending Recertification | **Exited - In Follow-Up** | Exited - Closed | Locked

#### Participant Summary

<b>Participant Name</b> Jane Knudser	<b>Participant ID</b> CMS009586463	<b>Month(s) in Program</b> 0 months, 0 days
<b>Primary Phone</b> (641) 228-1997	<b>Age</b> 86	
<b>Durational Limit Date</b> 08/14/2027	<b>Day(s) Left in Program</b> 1461	
<b>Recertification Date</b> 07/06/2006		

#### Exit Summary

**Type of Exit**  
Manual Exit



**Jane Knudser (Case ID: 10646328)**

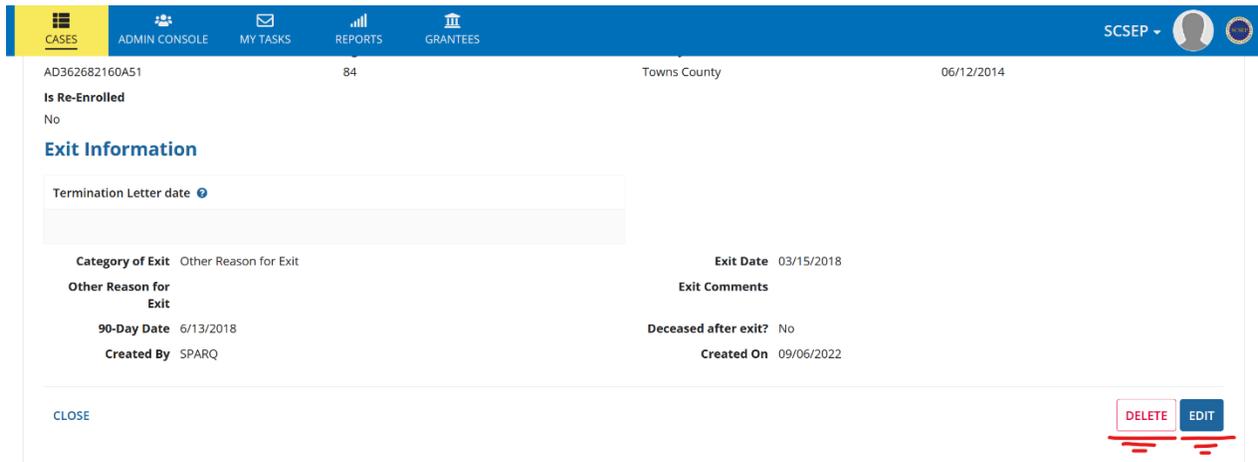
Summary | Assignments | Participant Required Actions | Placements/Follow-ups | Participant History | Extensions | Related Actions

- 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.



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

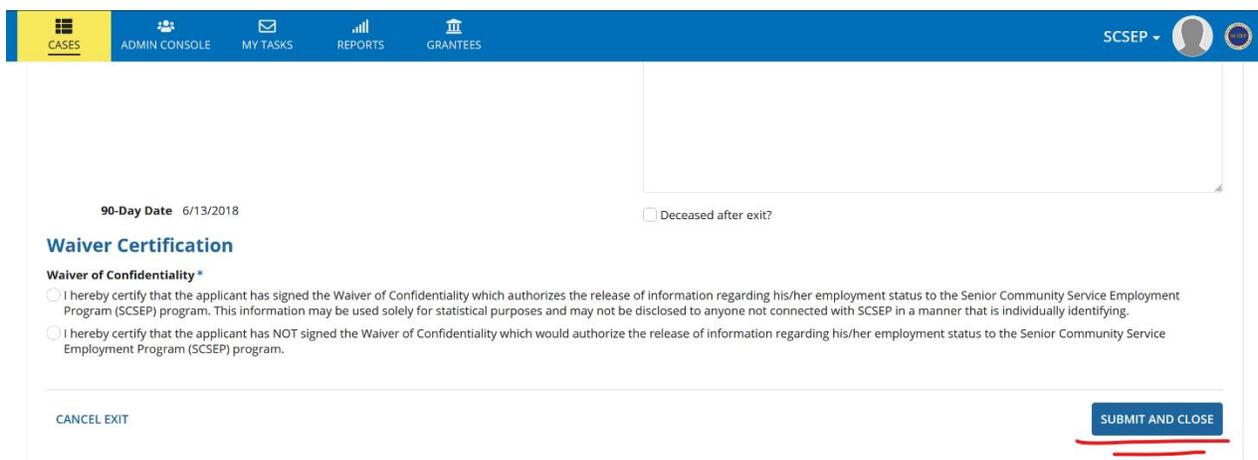
90-Day Date 6/13/2018 Deceased after exit? No

Created By SPARQ Created On 09/06/2022

CLOSE

DELETE EDIT

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



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.

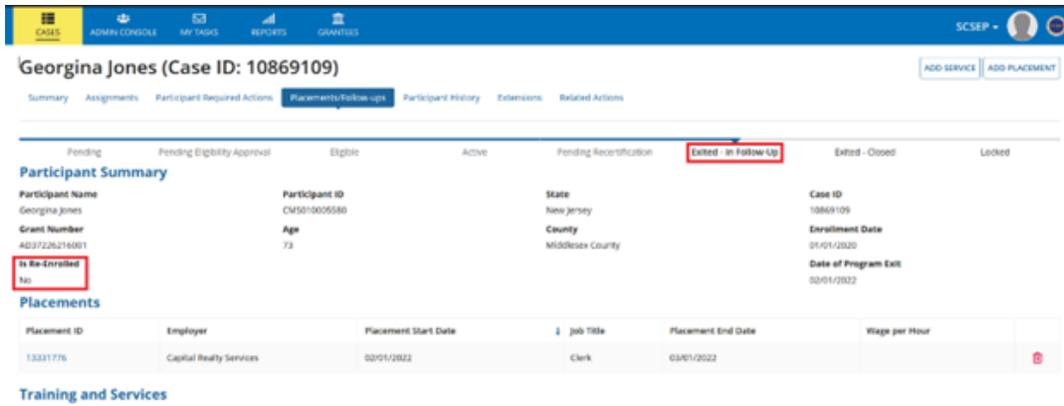
I hereby certify that the applicant has NOT signed the Waiver of Confidentiality which would authorize the release of information regarding his/her employment status to the Senior Community Service Employment Program (SCSEP) program.

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.



**Georgina Jones (Case ID: 10869109)**

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

Participant Summary

Participant Name Georgina Jones	Participant ID CM501005580	State New Jersey	Case ID 10869109
Grant Number 4037226216061	Age 73	County Middlesex County	Enrollment Date 01/01/2020
<b>Is Re-Enrolled</b> 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 \***

**Job Title**

**Host Agency Employer?**  
 Yes  
 No

**Starting Wage per Hour**

**Survey Contact**  
-- Select a contact --

**Job Code \***  
-- Select a job code --

**Average Hours**

**Supervisor**  
-- Select a supervisor --

Select only if Supervisor is different than Contact

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

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

**Training-related Placement?**  
 Yes  
 No

**Comments**  
0 / 2000

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

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

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

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

**Survey Information**

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

<b>Survey 1 Eligibility Date</b> mm/dd/yyyy	<b>Customer Satisfaction Survey 1 #</b> [Input Field]	<b>Date of Delivery</b> mm/dd/yyyy
<b>Survey 2 Eligibility Date</b> mm/dd/yyyy	<b>Customer Satisfaction Survey 2 #</b> [Input Field]	<b>Date of Delivery</b> mm/dd/yyyy
<b>Survey 3 Eligibility Date</b> mm/dd/yyyy	<b>Customer Satisfaction Survey 3 #</b> [Input Field]	<b>Date of Delivery</b> mm/dd/yyyy

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

Follow-Up 1 Date

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

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

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
<b>Participant Summary</b>							
<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>				
Georgina Jones	CMS010005580	New Jersey	10869109				
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>				
AD37226216001	73	Middlesex County	01/01/2020				
			<b>Date of Program Exit</b>				
			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**.

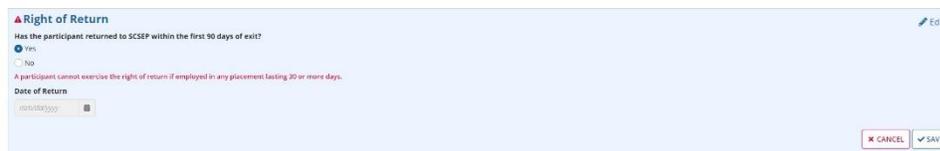


Note that the **Right of Return** data cannot be marked as **Yes** if the participant is attempting to exercise **Right of Return** more than 90 days after their **Exit date**.



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 \***

04/30/2023

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**

<b>Participant Name</b> Samantha Smith	<b>Participant ID</b> CMS010018533	<b>State</b> New Jersey	<b>Case ID</b> 10885356
<b>Grant Number</b> AD382882260A35	<b>Age</b> 73	<b>County</b> Somerset County	<b>Enrollment Date</b> 01/01/2023
<b>Is Re-Enrolled</b> 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.

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

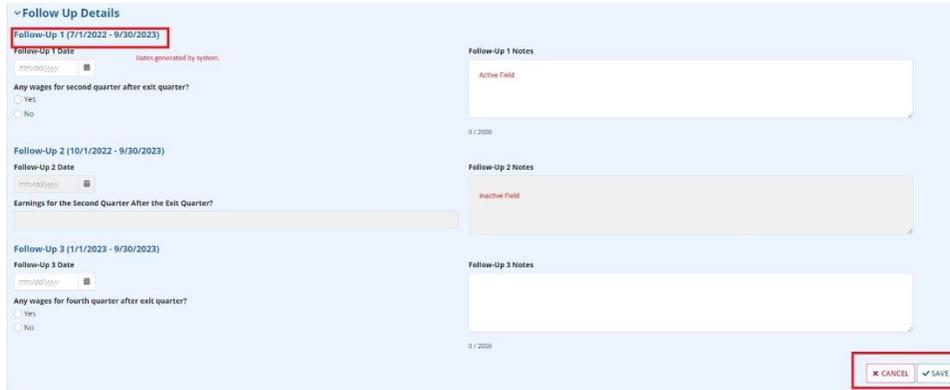
### Placement History

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.

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: 7/1/2022 (Dates generated by system.)  
 Any wages for second quarter after exit quarter?  
 Yes  
 No

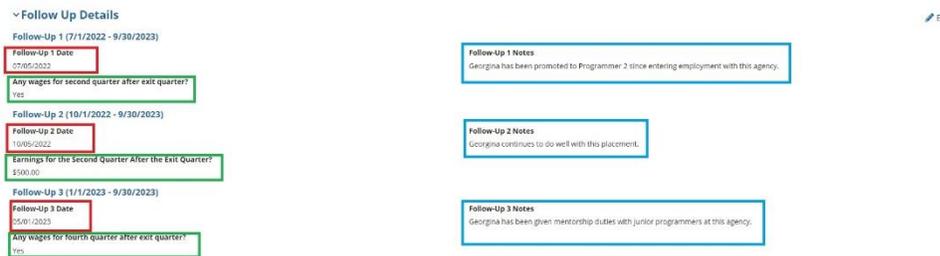
**Follow-Up 2 (10/1/2022 - 9/30/2023)**  
 Follow-Up 2 Date: 10/1/2022  
 Earnings for the Second Quarter After the Exit Quarter?  
 \$500.00

**Follow-Up 3 (1/1/2023 - 9/30/2023)**  
 Follow-Up 3 Date: 1/1/2023  
 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: Inactive Field

CANCEL SAVE

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: 07/01/2022  
 Any wages for second quarter after exit quarter?  
 Yes

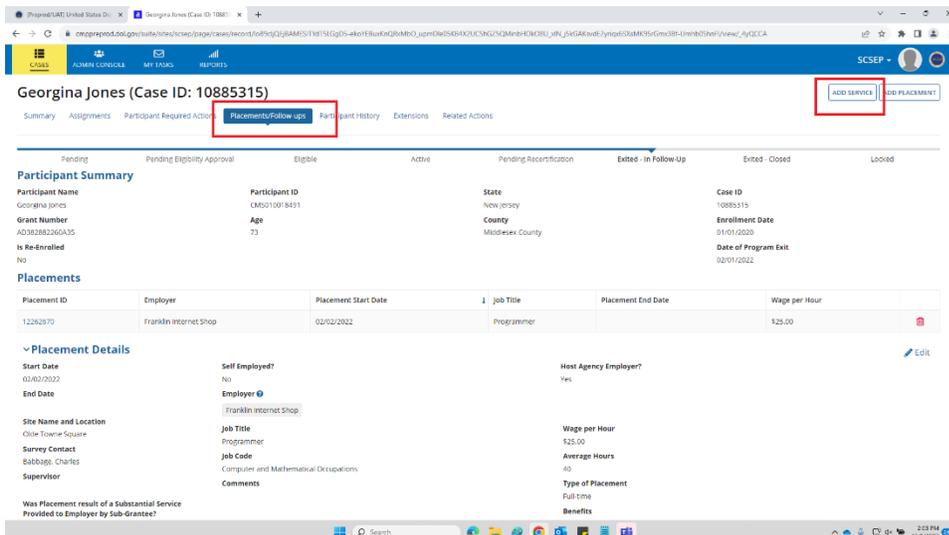
**Follow-Up 2 (10/1/2022 - 9/30/2023)**  
 Follow-Up 2 Date: 10/05/2022  
 Earnings for the Second Quarter After the Exit Quarter?  
 \$500.00

**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)

ADD SERVICE ADD PLACEMENT

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

Participant Summary

Participant Name	Georgina Jones	Participant ID	OMS010018491	State	New Jersey	Case ID	10885315
Grant Number	AD38288260A35	Age	73	County	Middlesex County	Enrollment Date	01/01/2020
Is Re-Enrolled	No					Date of Program Exit	02/01/2022

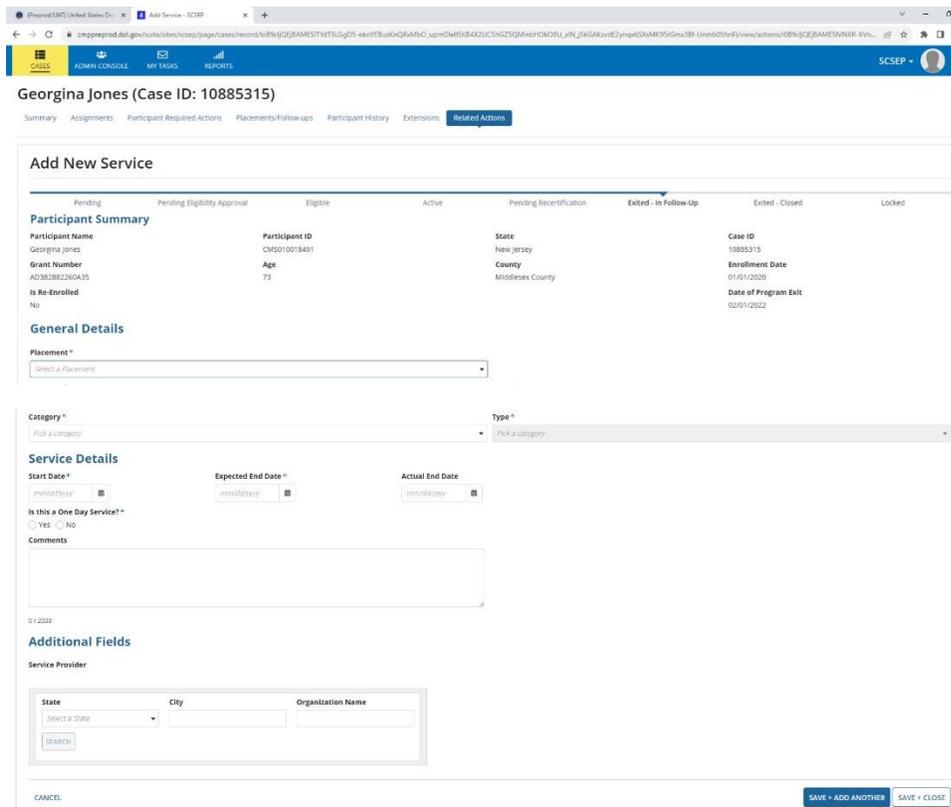
Placements

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

Placement Details

Start Date	07/02/2022	Self Employed?	No	Host Agency Employer?	Yes
End Date		Employer	Franklin Internet Shop	Job Title	Programmer
Site Name and Location	One Tower Square	Job Code	Computer and Mathematical Occupations	Wage per Hour	\$25.00
Survey Contact	BABSON, CHARLES	Comments		Average Hours	40
Supervisor		Was Placement result of a Substantial Service Provided to Employer by Sub-Grantee?		Type of Placement	Full-time
				Benefits	

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	Participant ID	State	Case ID
Georgina Jones	CH2010015001	New Jersey	10885315
Grant Number	Age	County	Enrollment Date
AD38282260435	73	Middlesex County	01/01/2020
Is Re-Enrolled	Date of Program Exit		
No	02/01/2022		

**General Details**

Placement\*

Category\*

Type\*

**Service Details**

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

Is this a One Day Service?\*  
 Yes  No

Comments

01/2023

**Additional Fields**

Service Provider

State  City  Organization Name

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\*

Type\*

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



Placement\*

Category\*

Type\*

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

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\*  
 mm/dd/yyyy

Expected End Date  
 mm/dd/yyyy

Actual End Date  
 mm/dd/yyyy

Is this a One Day Service?\*

Comments

Type\*  
 Pick a category  
 Pick a category  
 Counsel Participant on Job-Related Issues  
 Help Participant Get Another Job  
 Interventions 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\*  
 mm/dd/yyyy

Expected End Date  
 mm/dd/yyyy

Actual End Date  
 mm/dd/yyyy

Is this a One Day Service?\*

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

Referral Details

Initial Date  
 mm/dd/yyyy

Follow-Up Date  
 mm/dd/yyyy

Follow-Up Successful

Follow-Up Completed

Reason

Type\*  
 Referrals

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

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  
 02/02/2022

Follow-Up Date  
 03/01/2022

Reason

Follow-Up Successful  
 Yes  No

Follow-Up Completed  
 03/15/2022

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

Is this a One Day Service?\*

Comments

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

07/2020

**Additional Fields**

Service Provider

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

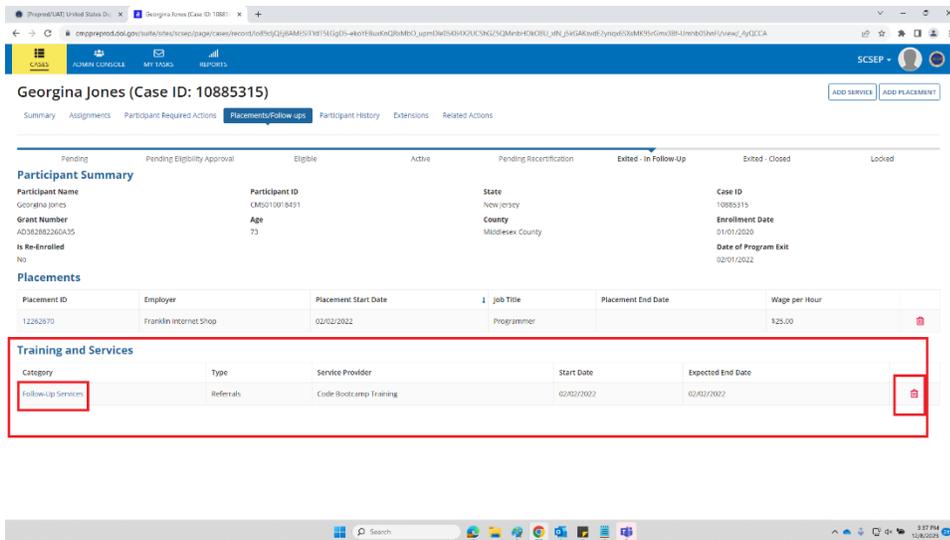
07/2020

**Additional Fields**

Service Provider  
Code Bootcamp Training X

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

Participant Summary

Participant Name	Participant ID	State	Case ID
Georgina Jones	085210018491	New Jersey	10885315
Grant Number	Age	County	Enrollment Date
AD38288260A35	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
12282870	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	<a href="#">Franklin Covey</a>	10005585	NOWA (New Jersey)	Fred Smith	1/1/2020		37	Active

### Recipient Sub-Grantee

\* Grantee

\* Sub-Grantee

\* Grant

\* Case Assigned To

\* 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	<a href="#">Franklin Covey</a>	10005585	NOWA (New Jersey)	Fred Smith	1/1/2020		37	Active

### Recipient Sub-Grantee

\* Grantee

\* Sub-Grantee

\* Grant

\* Case Assigned To

\* 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	<a href="#">Franklin Covey</a>	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

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

#### 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.

CANCEL

SUBMIT

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

- 1 **Grantee** option is chosen.
  - a. Choose a value for **Reason for Transfer**
  - b. Enter a value for **Requested Effective Date**
  - c. Acknowledge Donor Certification

Click **SUBMIT** to save changes.

## Discretionary Transfer Request

### Participant Information

<b>Participant First Name</b>	Grant	<b>Participant Last Name</b>	Lore	<b>Participant ID</b>	CMS010 005586	<b>Durational Limit Date</b>	Dec 30, 2024	<b>Grant Number</b>	AD3722 6216001
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### 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

<b>Participant First Name</b>	Grant	<b>Participant Last Name</b>	Lore	<b>Participant ID</b>	CMS010 005586	<b>Durational Limit Date</b>	Dec 30, 2024	<b>Grant Number</b>	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
<b>Mailing Address</b> <b>Address</b> 90 Excess Avenue Franklin, New Jersey 08823  <b>County of Residence</b> Somerset County	<b>Mailing Address</b> <b>Address Line 1 *</b> 6 Juniper Lane <b>Address Line 2</b>  <b>City *</b> <b>State *</b> <b>Zip *</b> <b>Zip+4</b> Santa Fe      New Mexico      90054  <b>County of Residence *</b> Santa Fe County
<b>Comment</b>  	
<b>Donor Certification *</b> <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.	
<input type="button" value="CANCEL"/> <input type="button" value="SUBMIT"/>	

### 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

### 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

### 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

Is Family Income at or below 125% poverty level?

- Yes  
 No

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

System Eligibility Determination: Eligible

### Reasons for Eligibility

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

## Recertification Eligibility Determination

SCSEP Eligible? \*

- Yes  
 No

PREVIOUS

SUBMIT

Choose an option for **SCSEP Eligible**.

**NO** selected:

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

**YES** selected:

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

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

### Participant Summary

<b>Participant Name</b> John John	<b>Participant ID</b> CMS099002376	<b>State</b> District of Columbia	<b>Case ID</b> 99002400
<b>Status</b> Active	<b>Age</b> 61	<b>County</b> District of Columbia	<b>Enrollment Date</b> 02/23/2022
<b>Grant Number</b> S5745			

**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

<b>Participant Name</b>	<b>Participant ID</b>	<b>State</b>	<b>Case ID</b>
Grant Lore	CMS010005586	New Jersey	10869115
<b>Status</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>
Active	73	Somerset County	01/01/2020
<b>Grant Number</b>			
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
<a href="#">Grant Lore</a>	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.

### Recert Example (Case ID: 10885357)

APPROVE RECERTIFICATION

Summary Assignments Participant Required Actions Participant History Extensions Related Actions

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

#### Participant Summary

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

#### Recertification (12/20/2023)

Edit

##### Recertification Details

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

##### Recertification Signature

Signature of director or authorized representative on recertification?  
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: edMAcasergr Denik Request Date: 12/20/2023  
Requester's Email: scsepmpredmacm@gmail.com

**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 unsubskilled 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

<b>Participant Name</b> Grant Lore	<b>Participant ID</b> CMS010005586	<b>State</b> New Jersey	<b>Case ID</b> 10869115
<b>Status</b> Active	<b>Age</b> 73	<b>County</b> Somerset County	<b>Enrollment Date</b> 01/01/2020
<b>Grant Number</b> 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.

5. 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

6. Click SUBMIT to continue to the next page.

**Participant Cases**

ADD NEW CASE

REASSIGN **SUBMIT**

7. . 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 \*

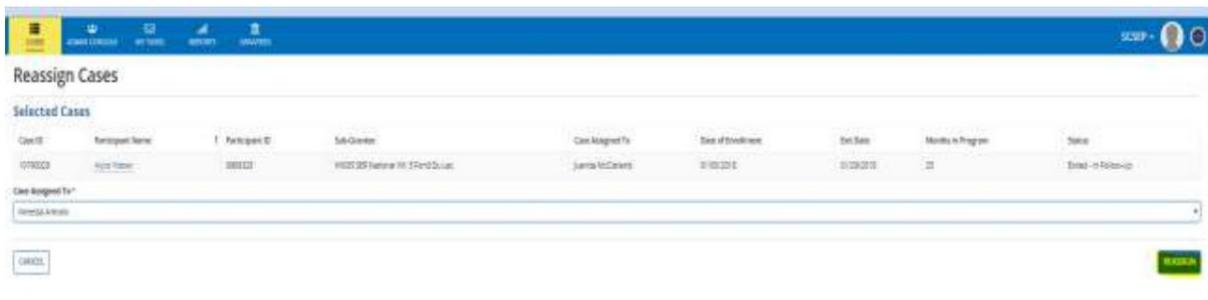
Patrice Lewis

8. 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 list of available case workers includes 'Patrice Lewis', which is highlighted in yellow. Other names like 'Juanita McClelland' and 'Patrice Lewis' are also visible in the list.

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

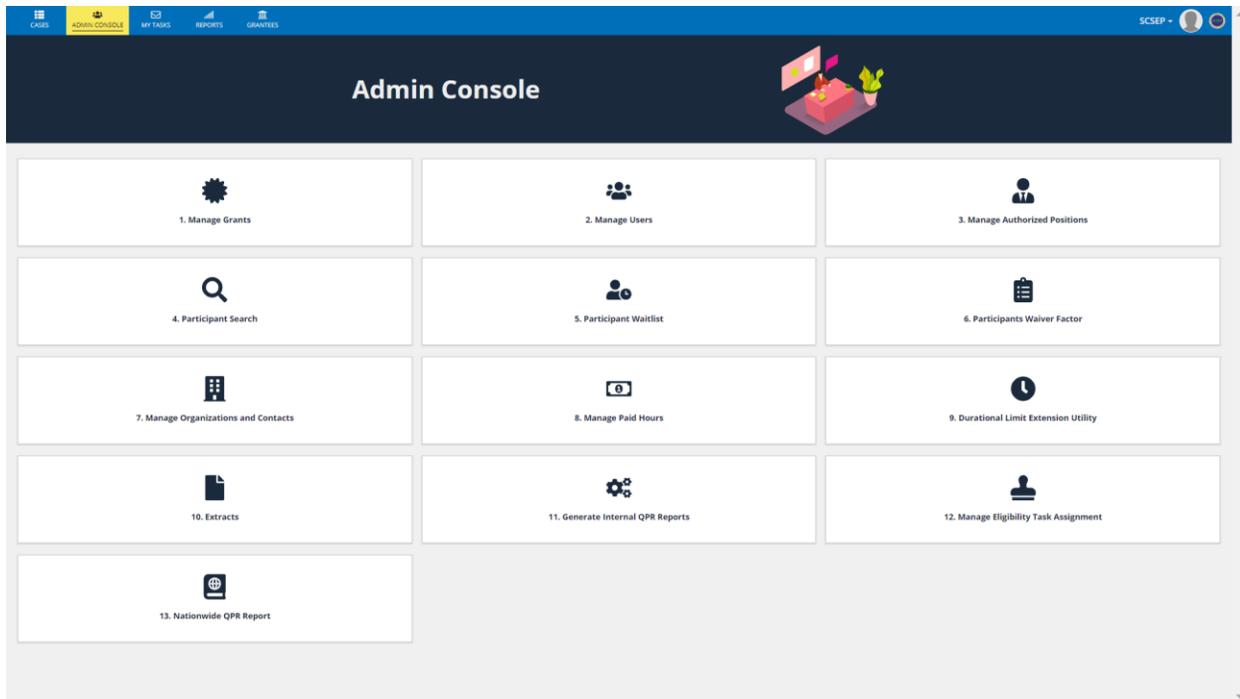


The screenshot shows the 'Reassign Cases' page with the 'Case Assigned To' dropdown menu closed and 'Patrice Lewis' selected. A green 'REASSIGN' button is visible at the bottom right of the page.

## 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.

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	

RESET SELECT PARTICIPANTS

CANCEL 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.

2. 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	
<input type="checkbox"/>	Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	
<input type="checkbox"/>	London	Diana	484794	Maryland	MD012 Baltimore City	7/4/2026	Locked	

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	
<input type="checkbox"/>	Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	
<input type="checkbox"/>	London	Diana	484794	Maryland	MD012 Baltimore City	7/4/2026	Locked	

**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 \***

3. 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	
<input checked="" 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	

**Certification of Extension Request \***

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

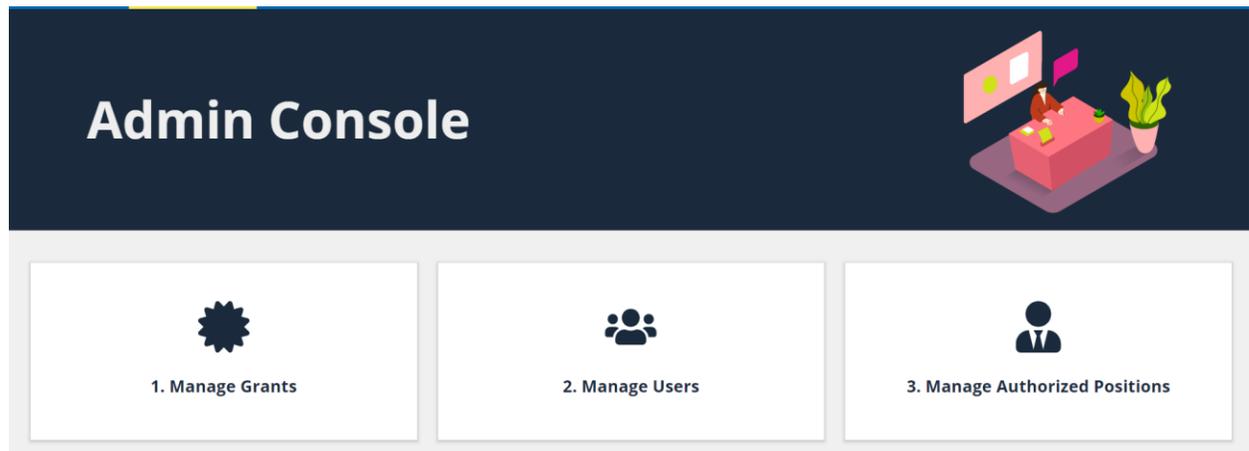
**Approved By \***

Chris Smith

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

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

### Grant Filters

**Program Year**

-- Select a Program Year --

#### Grants

Grant Number	Program Year
<a href="#">AD37226216001</a>	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

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

### Grant Filters

**Program Year**

2020

#### Grants

Grant Number	Program Year
<a href="#">AD37226216001</a>	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

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

### Grant Summary

<b>Grant Number</b> AD37226216001	<b>Program Year</b> 2020
--------------------------------------	-----------------------------

[ADD SUB-GRANTEE TO GRANT](#)

### Search Sub-Grantees

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

### Linked Sub-Grantees

### 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

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

### Grant Summary

<b>Grant Number</b> AD37226216001	<b>Program Year</b> 2020
--------------------------------------	-----------------------------

### Selected Sub-Grantees

Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
No Grant Access is Available				
<a href="#">+ ADD NEW</a>				

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"/>				✕
<a href="#">+ ADD NEW</a>				

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"/>				✘
NOWA (California)				
NOWA (New Jersey)				
NOWA (Puerto Rico)				

- 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) ✘				✘
NOWA (Puerto Rico) ✘				✘
<input type="button" value="ADD NEW"/>				

- 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

<input type="checkbox"/> Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/> MD001 Allegheny 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

<input checked="" type="checkbox"/> Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input checked="" type="checkbox"/> MD001 Allegheny 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\*** **Sub-Grantee\***

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

National Older Workers Association (NOWA) 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

<b>Sub-Grantee Name</b> NOWA (California)	<b>Sub-Grantee Code</b> 12347	<b>Region</b> Region
<b>Active</b> Yes	<b>Date First Active</b> 01/01/2020	<b>Date Last Active</b>

**ADD USER**

**Search Users**

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

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

<b>Sub-Grantee Name</b> NOWA (California)	<b>Sub-Grantee Code</b> 12347	<b>Region</b> Region
<b>Active</b> Yes	<b>Date First Active</b> 01/01/2020	<b>Date Last Active</b>

### > Audit History

#### Username And Role

Username\*

 Hannah Murphy ✕

\* Role

\* Supervisor

### User Basic Info

<b>First Name *</b>	<b>Last Name *</b>
<input type="text" value="Hannah"/>	<input type="text" value="Murphy"/>
<b>Work Phone</b>	<b>Email *</b>
<input type="text"/>	<input type="text" value="scsepmpri+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.

### 3.2 Update User

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

### User Organizations

**Grantee \***

**Sub-Grantee \***

**Add Global Read Only User**

Yes

No

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

## NOWA (California) Users

### Sub-Grantee Summary

<b>Sub-Grantee Name</b>	<b>Sub-Grantee Code</b>	<b>Region</b>
NOWA (California)	12347	Region
<b>Active</b>	<b>Date First Active</b>	<b>Date Last Active</b>
Yes	01/01/2020	

**Search Users**

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

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

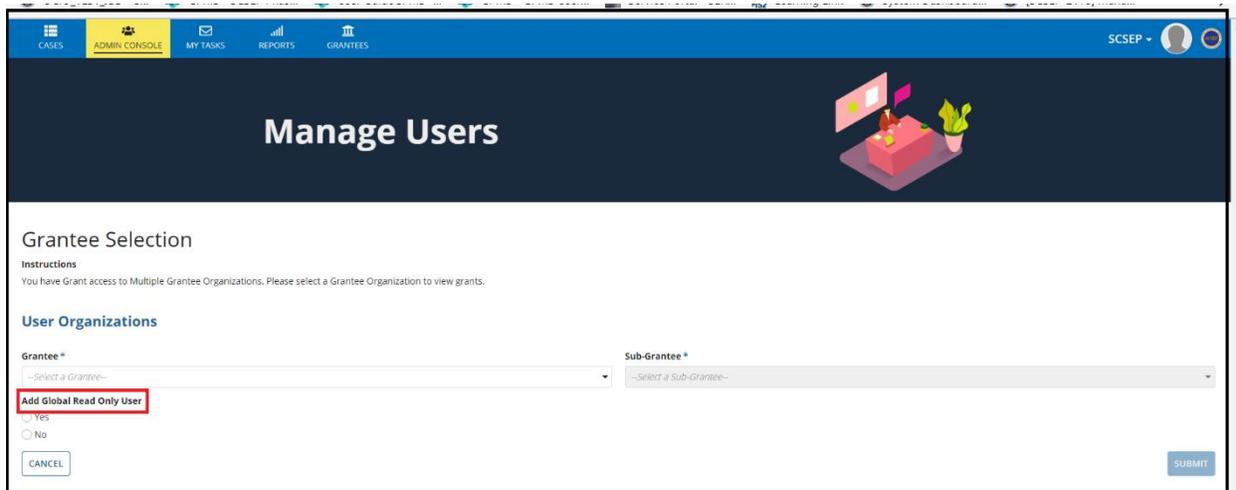
#### Username And Role

**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.

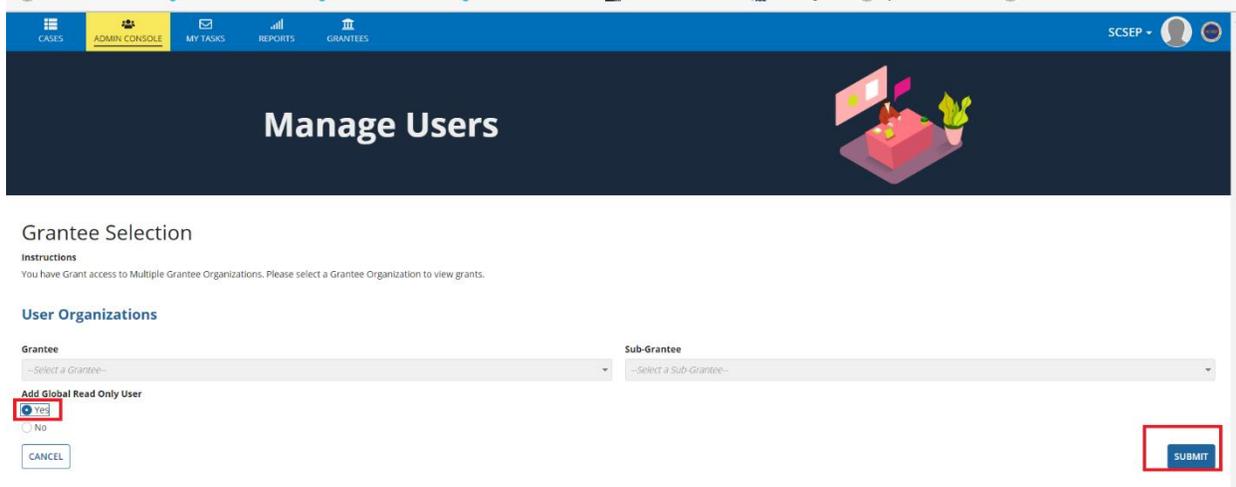
**User Organizations**

Grantee \*  
--Select a Grantee--

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

**Add Global Read Only User**

Yes  
 No



**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

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 - [User Profile]

### Add Global Read Only User

#### Username And Role

Username\*

\* Role

#### User Basic Info

First Name\*  Last Name\*

Work Phone  Email\*

#### User Details

Relationship to SCSEP\*

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

CASES ADMIN CONSOLE MY TASKS REPORTS GRANTEES SCSEP - [User Profile]

### Add Global Read Only User

#### Username And Role

Username\*

\* Role

#### User Basic Info

First Name\*  Last Name\*

Work Phone  Email\*

#### 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.

8. Action Completed message is displayed

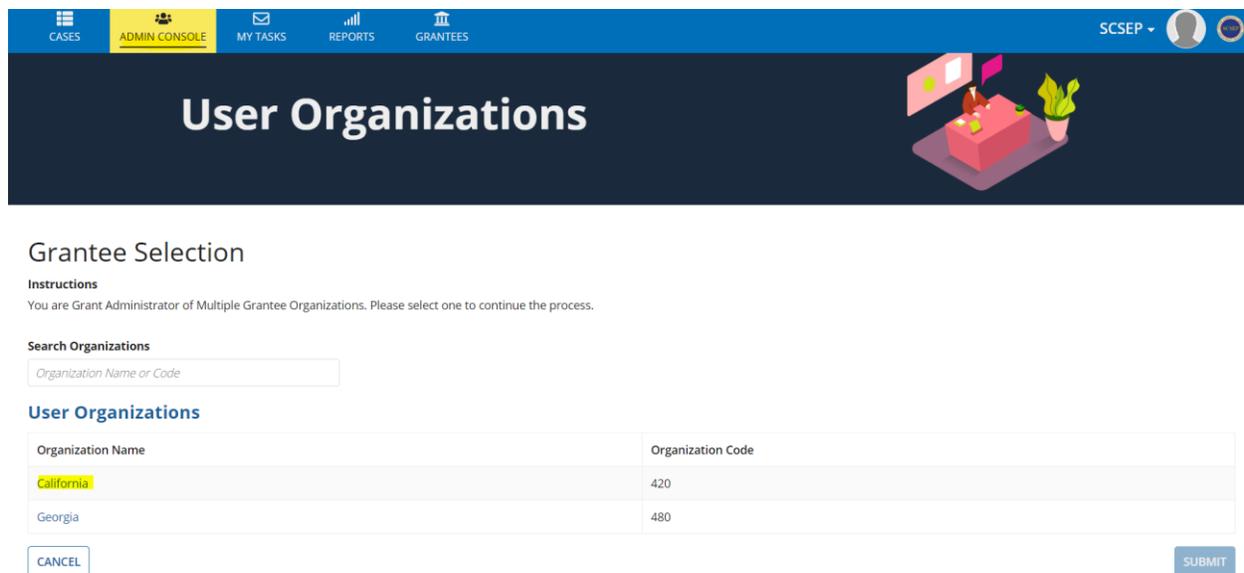
**Note:** To add **Read Only Restricted** user, follow same steps to add any other user role in the system.

#### 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

**User Organizations**

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.

2021
  -- 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	<a href="#">Washington County</a>	Maryland	50	39	11	N/A
2021	<a href="#">Park County</a>	Wyoming	250	50	200	N/A
2021	<a href="#">Prince William County</a>	Virginia	5	N/A	N/A	N/A
2021	<a href="#">Fairfax County</a>	Virginia	9	N/A	N/A	N/A
2021	<a href="#">Howard County</a>	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" value="Start typing Sub-Grantee's Name to pick from available options"/>		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" value="S"/>		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

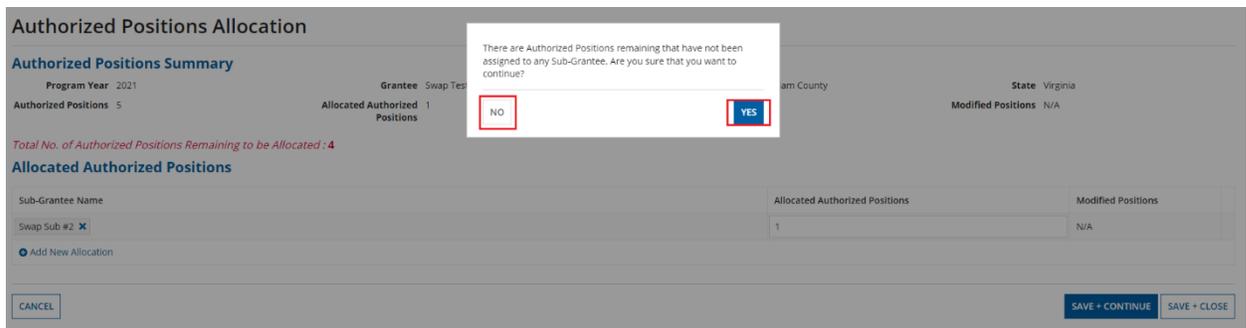
CANCEL

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 above, 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 "NO" button is highlighted with a red border, and the "YES" button is highlighted with a blue 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.

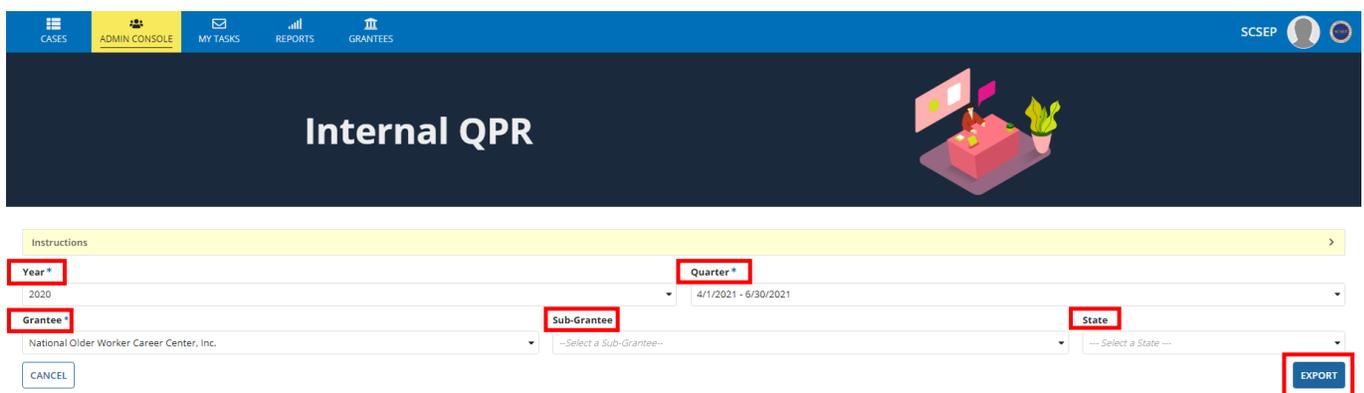
## 5. Generate Internal QPR Reports

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 in the Admin Console. The form has a blue header with navigation tabs: CASES, ADMIN CONSOLE, MY TASKS, REPORTS, and GRANTEES. The main content area is dark blue with the title 'Internal QPR' and an illustration of a person at a desk. Below the title is an expandable 'Instructions' section. The form contains five dropdown menus: 'Year\*' (2020), 'Quarter\*' (4/1/2021 - 6/30/2021), 'Grantee\*' (National Older Worker Career Center, Inc.), 'Sub-Grantee' (placeholder: --Select a Sub-Grantee--), and 'State' (placeholder: -- Select a State --). A 'CANCEL' button is on the left, and an 'EXPORT' button is on the right.

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\***

## 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\***

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

**Required Filters**

**Grantee \***

**Sub-Grantee \***

**Program Year \***

National Older Workers Association (NOWA) ▼

NOWA (New Jersey) ▼

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	To
01/01/2020	01/15/2023

**Exit** ▼

From	To
01/01/2020	01/15/2023

2. Upon entering the above required values, the **Reset** and **Search** buttons become visible.
  - Click **Reset** to clear all selections and begin a new search.
  - Click **Search** to search for participants within the specified selections. Participants who meet the selection criteria will be displayed on the screen.
3. Enter the hours for each participant in the appropriate category. As hours are entered, the Total Hours row is updated with the total number of hours entered in the rows above for that participant.
4. If the **SAVE** button is grayed out and cannot be clicked, click anywhere on the screen to activate it.
5. Click **SAVE** to save the entered data.

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

**Total Hours Paid in Quarter**

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

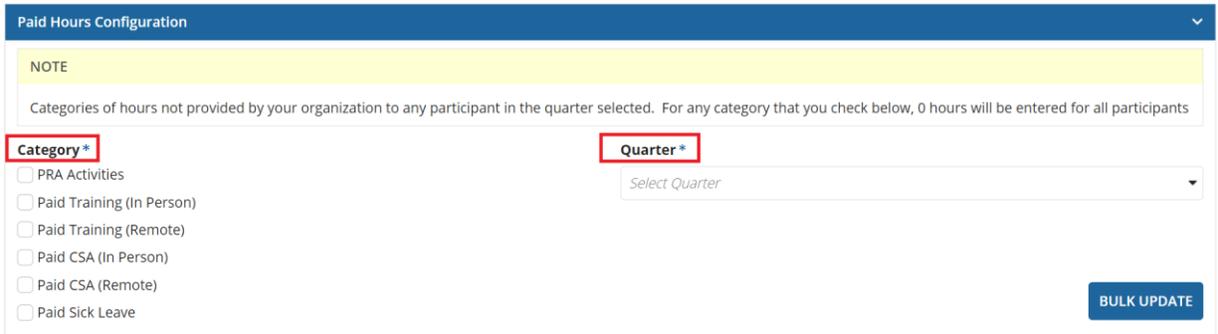
**WARNING** User must click save after modifying any data on the current page before user can go to the next page

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

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\***

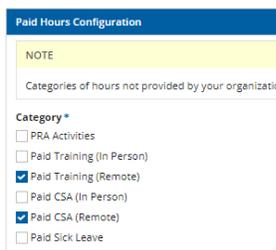
- PRA Activities
- Paid Training (In Person)
- Paid Training (Remote)
- Paid CSA (In Person)
- Paid CSA (Remote)
- Paid Sick Leave

**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

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

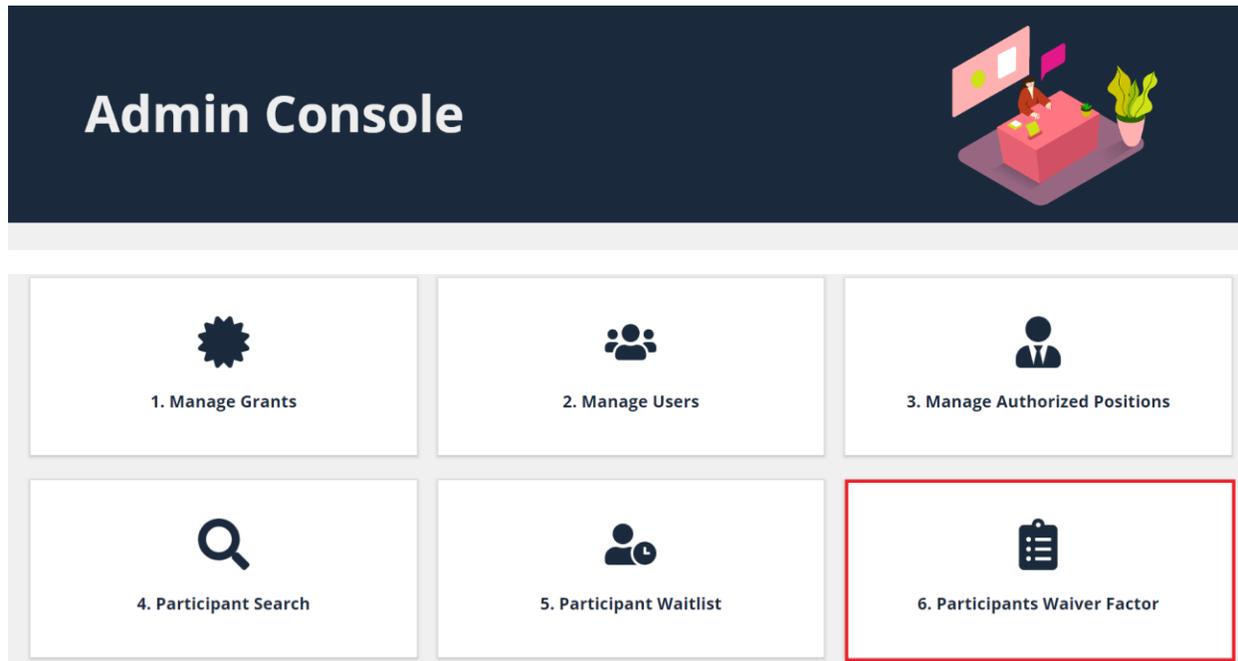
All hours fields for the selected category(s) and quarter will be set to 0.

**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	0	0
						Paid Training (In Person)	0	0	0	0
						Paid Training (Remote)	0	0	0	0
						Paid CSA (In Person)	0	0	0	0
						Paid CSA (Remote)	0	0	0	0
						Paid Sick Leave	0	0	0	0
						Total Hours	0	0	0	0
Elizabeth Windsor	CM5000498088	M & T Bank	06/01/2017		2021	PRA Activities	0	0	0	0
						Paid Training (In Person)	0	0	0	0
						Paid Training (Remote)	0	0	0	0
						Paid CSA (In Person)	0	0	0	0
						Paid CSA (Remote)	0	0	0	0
						Paid Sick Leave	0	0	0	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 \***  
Swap Test #1

**Sub-Grantee \***  
Swap Sub #2

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
<a href="#">Adrian Allweather</a>	2022	✓
<a href="#">Belinda Chesterfield</a>	2022	✓
<a href="#">Brenda Johnson</a>	2022	✓
<a href="#">Caroline O'Dell</a>	2022	✓
<a href="#">Charles Dexter-Ward</a>	2022	✓
<a href="#">Deliah Derbyshire</a>	2022	✓
<a href="#">Edward Murphy</a>	2022	✓
<a href="#">Grant Lore</a>	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
<a href="#">Adrian Allweather</a>	2022	✓
<a href="#">Belinda Chesterfield</a>	2022	✓
<a href="#">Brenda Johnson</a>	2022	✓
<a href="#">Caroline O'Dell</a>	2022	✓
<a href="#">Charles Dexter-Ward</a>	2022	✓
<a href="#">Deliah Derbyshire</a>	2022	✓
<a href="#">Edward Murphy</a>	2022	✓
<a href="#">Grant Lore</a>	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.

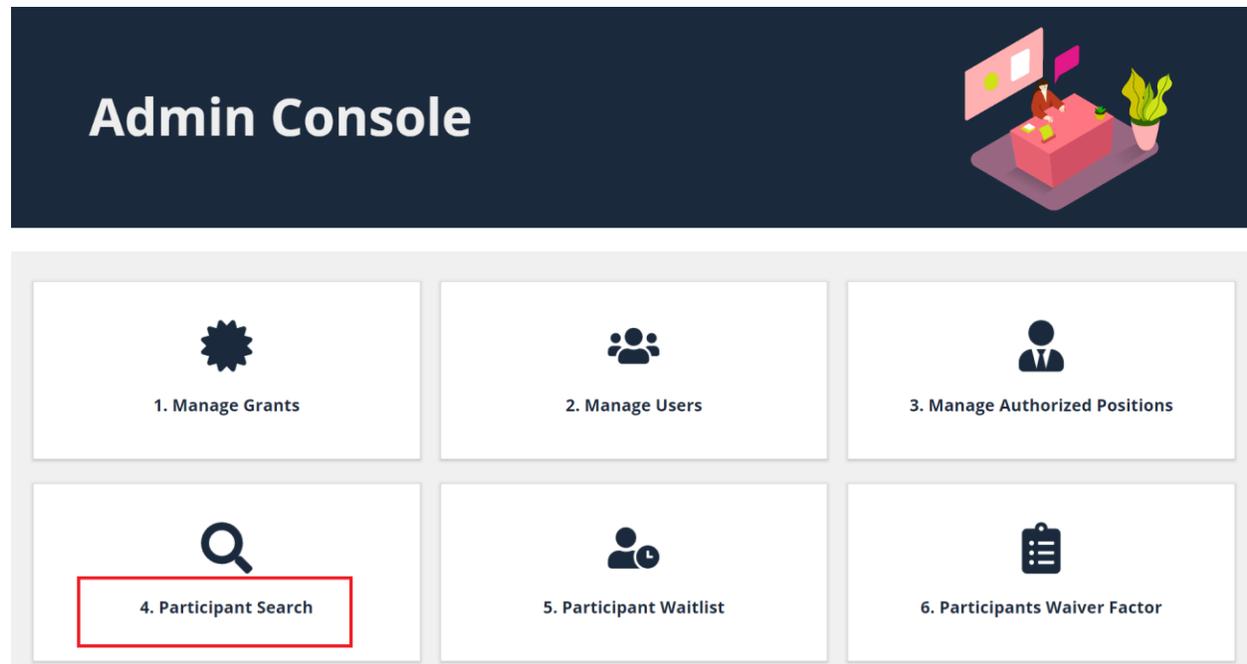
Participant: Jeannie Sims

Waiver Factors for Program Year 2023

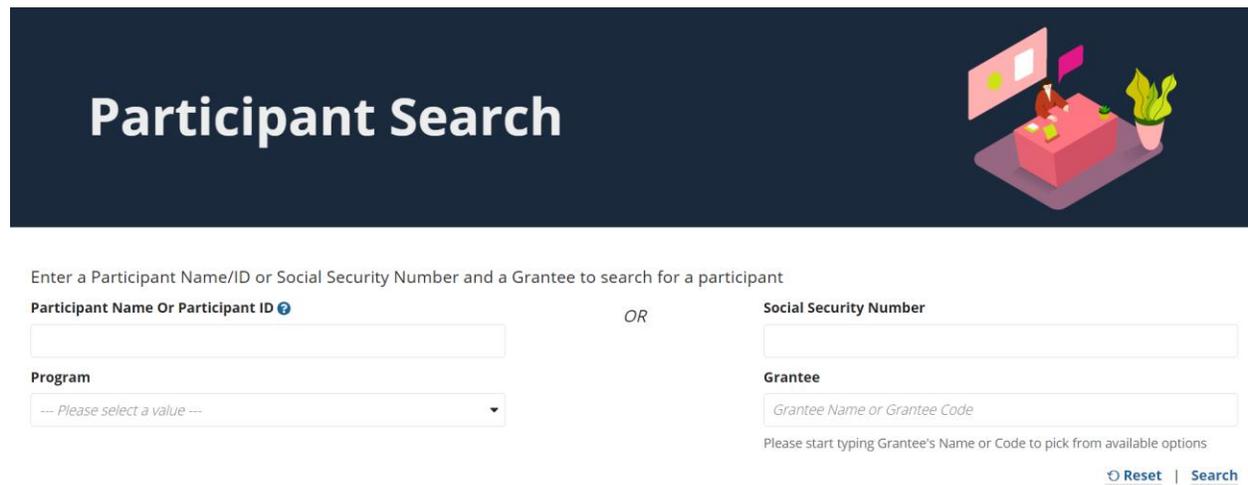
<b>Severe Disability *</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Last Updated Date *</b> 10/13/2023
<b>Frail *</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Last Updated Date *</b> 10/13/2023
<b>Old Enough but Not Receiving SS Title II *</b> <input type="radio"/>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



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

Grantee

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

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

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

10 items

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

## Participant Summary For SCSEP Program

[BACK TO SEARCH](#)

### Participant Summary

**Participant Name** Adrian Allweather

**Participant ID** 10005587

**Date of Birth** 01/01/1950

**Day(s) Left in Program** 711

**Durational Limit Date** 12/30/2024

**Month(s) in Program** 36 months, 20 days

**Date of Last Extension Request**

**Eligible to Enroll?** No

## 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**

(222) 232-6022 

**Alternate Phone**

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**

**Sub-Grantee**

National Older Workers Association (NOWA) ▾

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](#)



## Participant Summary

<b>Participant Name</b> Susan Sangria	<b>Participant ID</b> CMS010005614	<b>Month(s) in Program</b> 0 months, 0 days
<b>Primary Phone</b> (222) 222-2222	<b>Age</b> 73	
<b>Durational Limit Date</b>	<b>Day(s) Left in Program</b> 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"/>

## 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

<p><b>State *</b></p> <p>Select a State</p>	<p><b>City *</b></p>	<p><b>Organization Name *</b></p>
<p>RESET SEARCH</p>		

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 \*

City \*

Organization Name \*

[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 \*

City \*

Organization Name \*

[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\*** 
**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
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\*** 
**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
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

Organization Type\*

- Government  
 Profit  
 Not For Profit

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	
<a href="#" style="color: #0056b3; text-decoration: none; display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">+</span> Add New         </a>	

- 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	
<span style="border: 2px solid red; padding: 5px; display: inline-block;"> <span style="color: #0056b3; font-weight: bold;">+</span> Add New         </span>	

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

Agency Type	Organization Continued Availability
<div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">--- Please select a value ---</div> <div style="background-color: #0056b3; color: white; padding: 2px;">--- Please select a value ---</div> <div style="padding: 2px;">Host Agency</div> <div style="padding: 2px;">Employer</div> <div style="padding: 2px;">Service Provider</div> </div>	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <input type="radio"/> Available  <input type="radio"/> Not Available         </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20px; height: 20px; color: red; font-weight: bold;">x</div> </div>
<input type="checkbox"/> 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 style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;">Host Agency</div> </div>	<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;"> <input type="radio"/> Available  <input type="radio"/> Not Available         </div> <div style="border: 1px solid #ccc; padding: 5px; text-align: center; width: 20px; height: 20px; color: red; font-weight: bold;">x</div> </div>
<span style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;"> <span style="color: #0056b3; font-weight: bold;">+</span> Add New         </span>	
<p><b>Host Agency Agreement Date</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: small; color: #ccc;">mm/dd/yyyy</span> <span style="margin-left: 5px;">📅</span> </div>	<p><b>Host Agency Monitoring Visit Date</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: small; color: #ccc;">mm/dd/yyyy</span> <span style="margin-left: 5px;">📅</span> </div>
<p><b>Job Codes</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;"> <span style="font-size: small; color: #ccc;">--Select at most 3 Job Codes--</span> <span style="margin-left: 5px;">▼</span> </div>	

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	<input type="checkbox"/> X
Employer	<input type="radio"/> Available <input type="radio"/> Not Available	<input type="checkbox"/> X

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 Contact ~ Contact Address

Salutation

Check if Contact Address is different than the Organization Address

Contact First Name \*  Contact Last Name \*

Title \*  Is Primary POC?  Yes  No

Primary Contact Number   Cell? Alternate Contact Number   Cell?

Primary Extension  Alternate Extension

Fax Number  E-mail

CANCEL SAVE

4. Enter the additional contact's information.

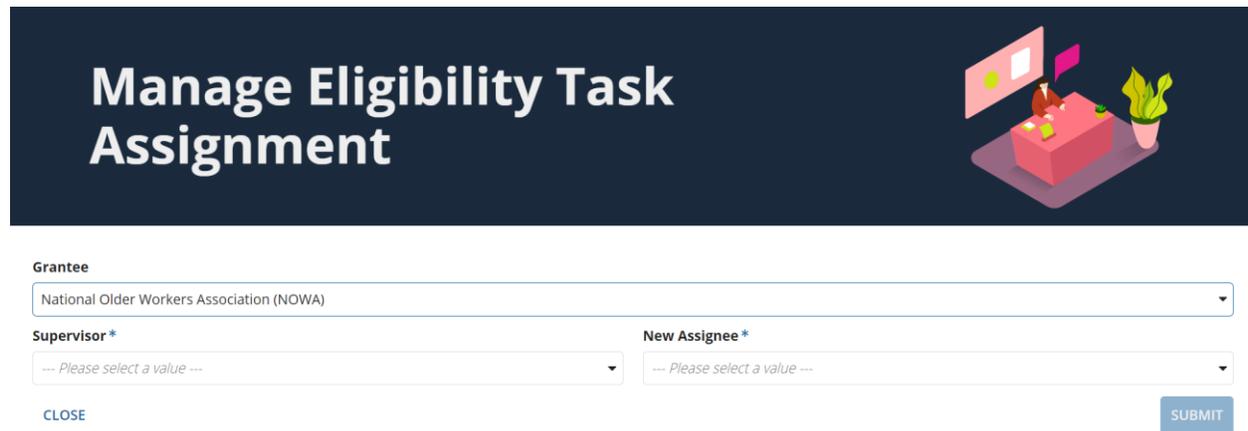
5. Click **SAVE**.

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**.



**Manage Eligibility Task Assignment**

**Grantee**  
National Older Workers Association (NOWA)

**Supervisor\*** --- Please select a value ---

**New Assignee\*** --- Please select a value ---

[CLOSE](#) [SUBMIT](#)

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

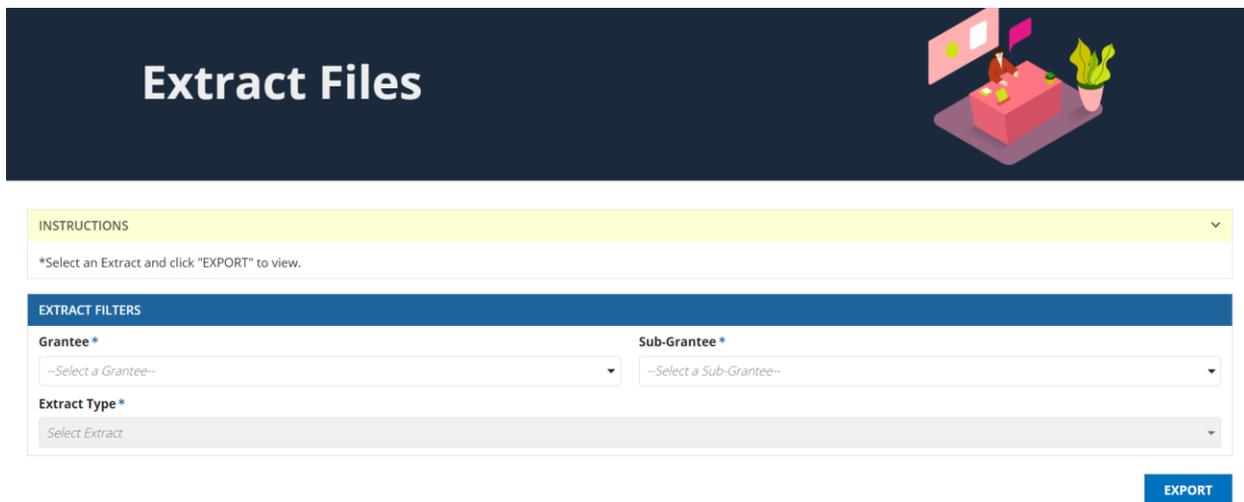
Grantee administrators and program analysts can export extracts from the ADMIN CONSOLE for the grantees to which they are assigned. The extracts available for export are Participant Extract, Waiver Extract and Break Extract.

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.



A confirmation dialog box is displayed.



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

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

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

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

## 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.

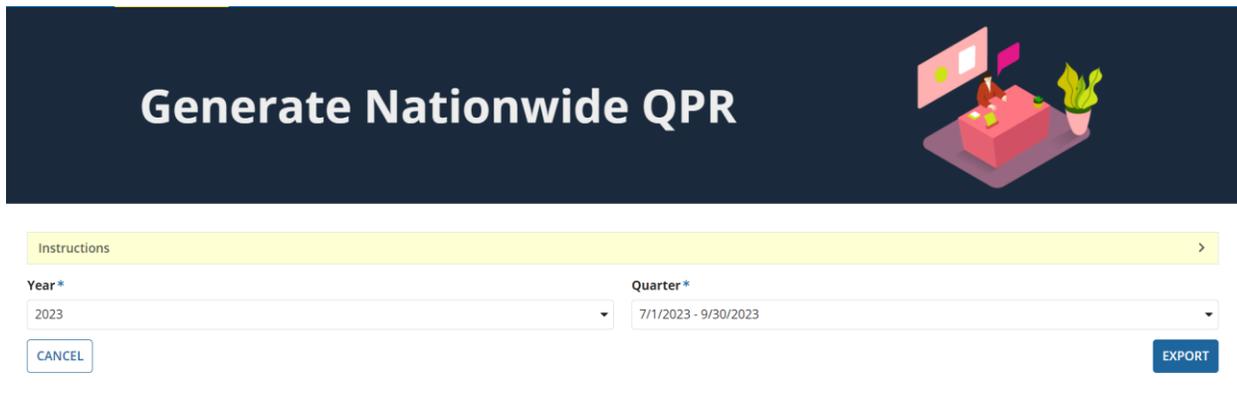
The file is downloaded in .csv format.

## 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 De  
To [REDACTED]



1:51 PM

Hello,

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

[PY 2022 Qtr 4 Performance Report for SCSEP](#)

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

Thank you.

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

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

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

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

**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--

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

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

**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

Type here to search    12:32 PM 12/1/2022

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*.

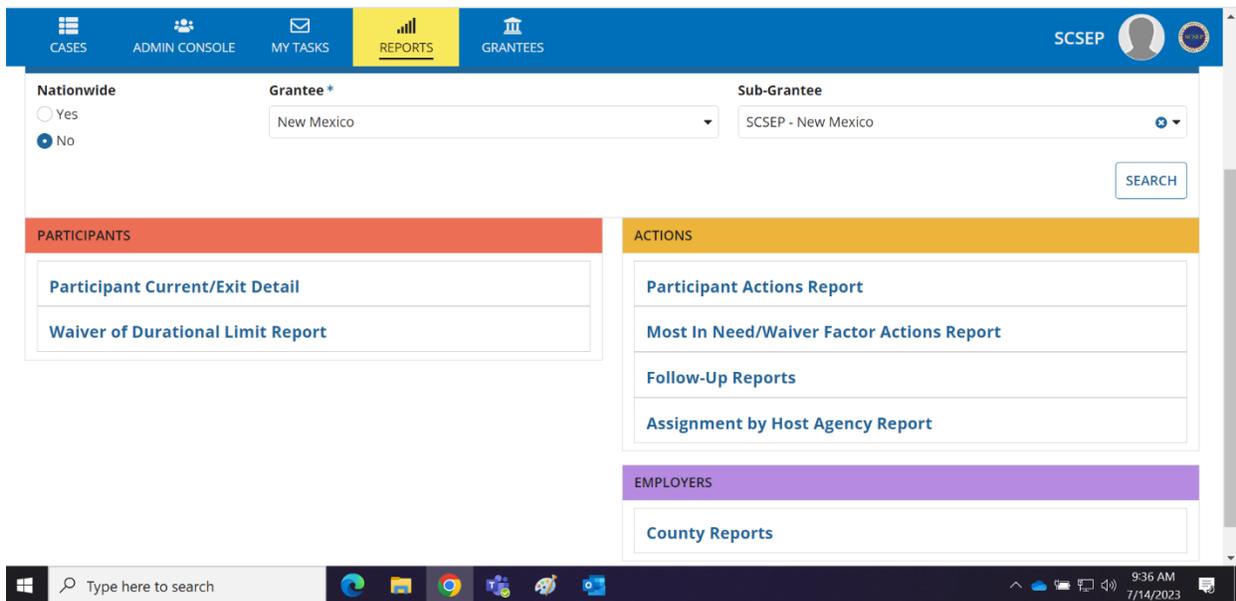
**4. Grantee Admin:** As above, for case Manager, **plus** these additional.

- 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.



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.

[← Back](#)

### Participant Current/Exit Detail

**Filters**

<b>Active Filters for Enrollments</b>  <input type="text" value="Select a status filter type"/>	<b>Active Filters for Assignments*</b> <input type="text" value="Select a status filter type"/>	<b>Initial Assignment Date From</b> <input type="text" value="mm/dd/yyyy"/> 	<b>Initial Assignment Date To</b> <input type="text" value="mm/dd/yyyy"/> 
		<b>Exit Date From</b> <input type="text" value="mm/dd/yyyy"/> 	<b>Exit Date To</b> <input type="text" value="mm/dd/yyyy"/> 

RESET

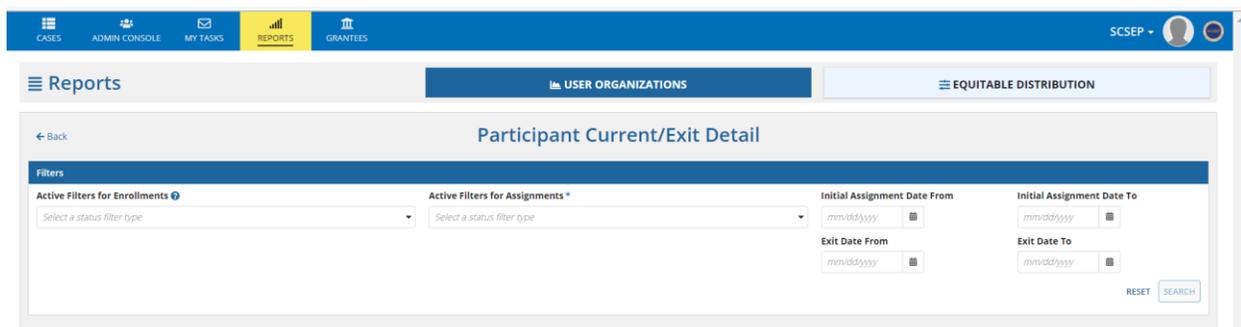
**Reports** **USER ORGANIZATIONS** EQUITABLE DISTRIBUTION

**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**

<b>Nationwide</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Grantee*</b> <input type="text" value="District of Columbia"/>	<b>Sub-Grantee</b> <input type="text" value="--Select a Sub-Grantee--"/>
---	--	---

## 1.1 Participant Current/Exit Detail



**Reports** **USER ORGANIZATIONS** EQUITABLE DISTRIBUTION

[← Back](#)

### Participant Current/Exit Detail

**Filters**

<b>Active Filters for Enrollments</b>  <input type="text" value="Select a status filter type"/>	<b>Active Filters for Assignments*</b> <input type="text" value="Select a status filter type"/>	<b>Initial Assignment Date From</b> <input type="text" value="mm/dd/yyyy"/> 	<b>Initial Assignment Date To</b> <input type="text" value="mm/dd/yyyy"/> 
		<b>Exit Date From</b> <input type="text" value="mm/dd/yyyy"/> 	<b>Exit Date To</b> <input type="text" value="mm/dd/yyyy"/> 

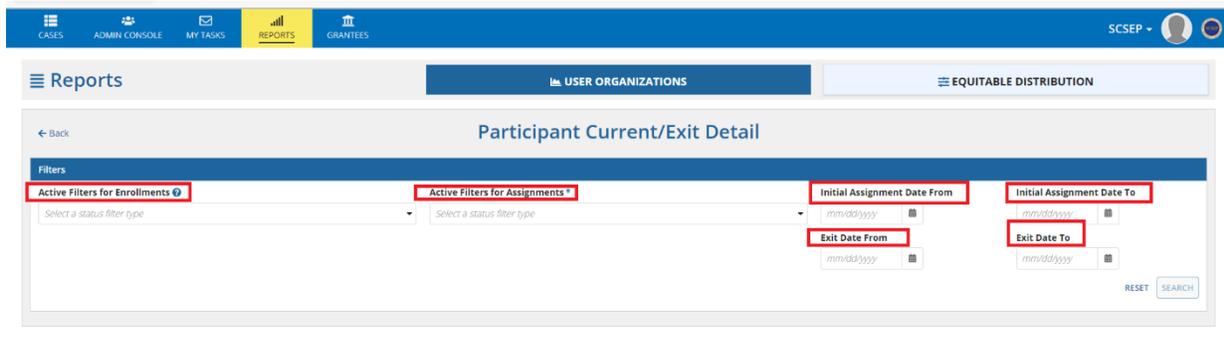
RESET

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.

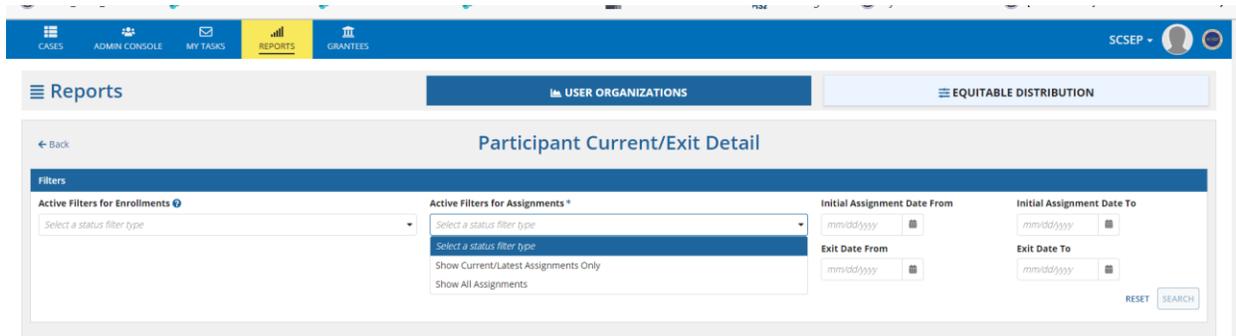
- **Initial Assignment Date From:** Optional field to narrow your search.
- **Initial Assignment Date To:** Optional field to narrow your search.
- **Exit Date From:** Optional field to narrow your search.
- **Exit Date To:** Optional field to narrow your search.

Clicking Reset will clear the values for the filters.



The screenshot shows the 'Participant Current/Exit Detail' form. The 'Filters' section contains four fields: 'Active Filters for Enrollments', 'Active Filters for Assignments', 'Initial Assignment Date From', and 'Initial Assignment Date To'. The 'Active Filters for Assignments' field is highlighted with a red box, indicating it is a required field. Below it, there are two date pickers: 'Exit Date From' and 'Exit Date To', also highlighted with red boxes. A 'RESET' button and a 'SEARCH' button are located at the bottom right of the filter section.

Active Filters for Assignment is a required field.



The screenshot shows the 'Participant Current/Exit Detail' form with the 'Active Filters for Assignments' dropdown menu open. The dropdown menu displays three options: 'Show Current/Latest Assignments Only' and 'Show All Assignments'. The 'Active Filters for Enrollments' field is also visible, with a dropdown menu showing 'Select a status filter type'. The date pickers for 'Initial Assignment Date From', 'Initial Assignment Date To', 'Exit Date From', and 'Exit Date To' are also visible. A 'RESET' button and a 'SEARCH' button are located at the bottom right of the filter section.

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

**Filters**  
 Active Filters for Enrollments 
Active Filters for Assignments 
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 
RESULTS

---

**Results Summary**

<b>Number of Current Participants:</b> 288 <b>Average Time in Program:</b> 620 Days <b>Average Time in (District of Columbia):</b> 620.08 Days <b>Number of Participants with More Than One Displayed Enrollment:</b> 29 <b>Average Number of Enrollments Per Participant:</b> 1.05 <b>Average Days in Displayed Enrollments:</b> 520.51 <b>Average Number of Displayed Assignments Per Enrollments:</b> 1 <b>Average Days in Current Assignments:</b> 495 <b>Average Days in Displayed Assignments:</b> 495	<b>Number of Exited Participants:</b> 314 <b>Percentage Exiting for Employment:</b> 41.08% <b>Percentage Exiting for Other Reason:</b> 10.19% <b>Percent Excluded at Exit:</b> 4.14% <b>Number of Participants Ever on Leave of Absence:</b> 114 <b>Average Number of Leaves of Absence Per Enrollment:</b> 1.25 <b>Average Days Ever on Leave of Absence:</b> 28.11
---	---

---

**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**

<b>Number of Current Participants:</b> 288 <b>Average Time in Program:</b> 620 Days <b>Average Time in (District of Columbia):</b> 620.08 Days <b>Number of Participants with More Than One Displayed Enrollment:</b> 29 <b>Average Number of Enrollments Per Participant:</b> 1.05 <b>Average Days in Displayed Enrollments:</b> 520.51 <b>Average Number of Displayed Assignments Per Enrollments:</b> 1 <b>Average Days in Current Assignments:</b> 495 <b>Average Days in Displayed Assignments:</b> 495	<b>Number of Exited Participants:</b> 314 <b>Percentage Exiting for Employment:</b> 41.08% <b>Percentage Exiting for Other Reason:</b> 10.19% <b>Percent Excluded at Exit:</b> 4.14% <b>Number of Participants Ever on Leave of Absence:</b> 114 <b>Average Number of Leaves of Absence Per Enrollment:</b> 1.25 <b>Average Days Ever on Leave of Absence:</b> 28.11
---	---

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	F	
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	Average Days in Disposition
2	288	620	620.08	29	1.05	520.51
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	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		4/3/2022	4/4/2022	Exited - Closed
99003322	Christian Eriksen		9/1/2021		Active
99002873	David Silva		6/14/2022		Active
99001089	David Warner		8/13/2017	2/2/2022	Exited - In Follow-Up
99001082	Edwin Baker		6/1/2021	8/13/2021	Exited - Closed

1 - 10 of 559

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

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

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

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

EXPORT

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

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

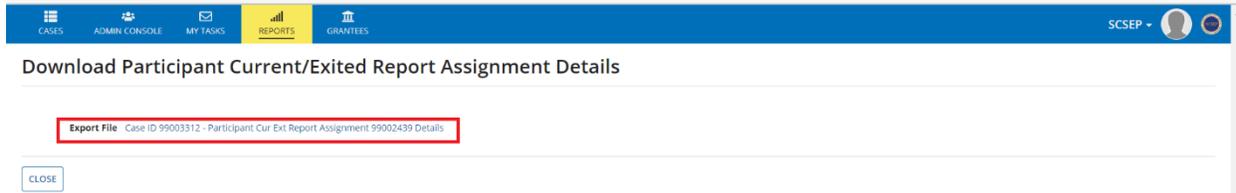
Participant Current/Exited Report Assignment details data is being exported. Click refresh until the file is ready to download.

**Export File** Exporting...  
(Last Refresh: 9/21/2022 8:17 AM EDT)

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 Participant Current/Exited Report Assignment Details

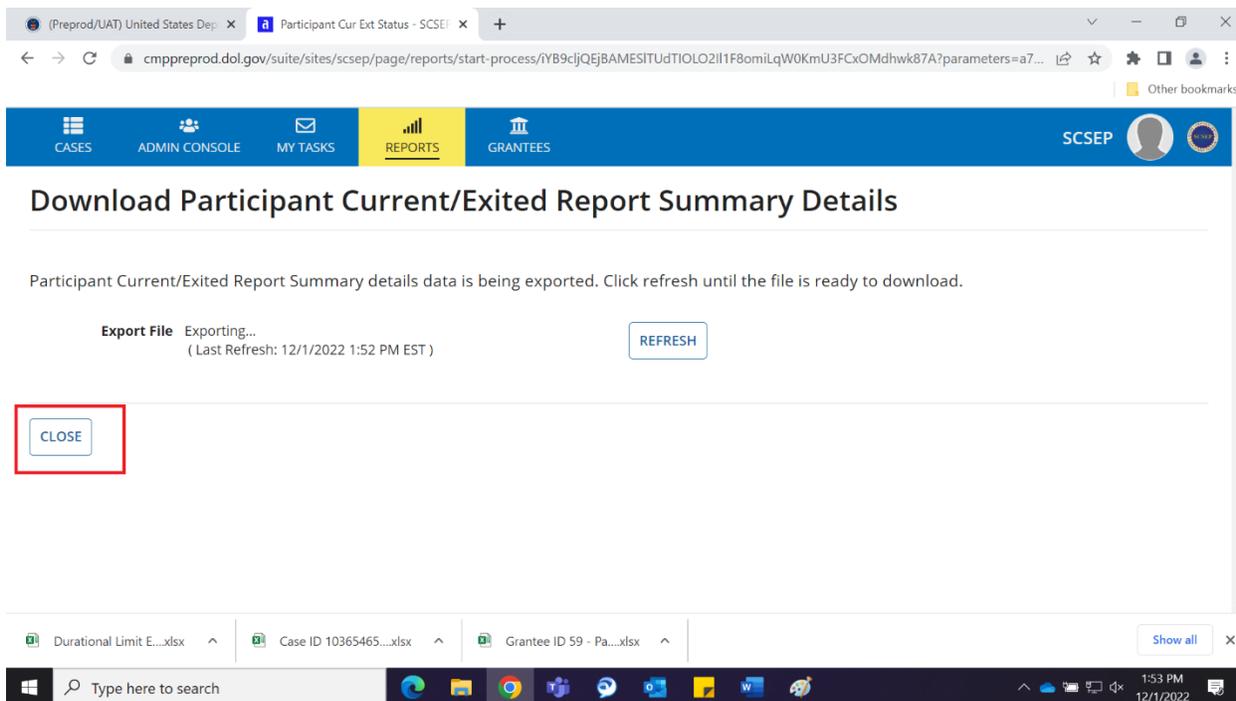
**Export File** Case ID 99003312 - Participant Cur Ext Report Assignment 99002439 Details

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/fYB9cjQEjBAMESITUdTIOL02II1FBomiLqW0KmU3FCxOMdhwk87A?parameters=a7...

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

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.

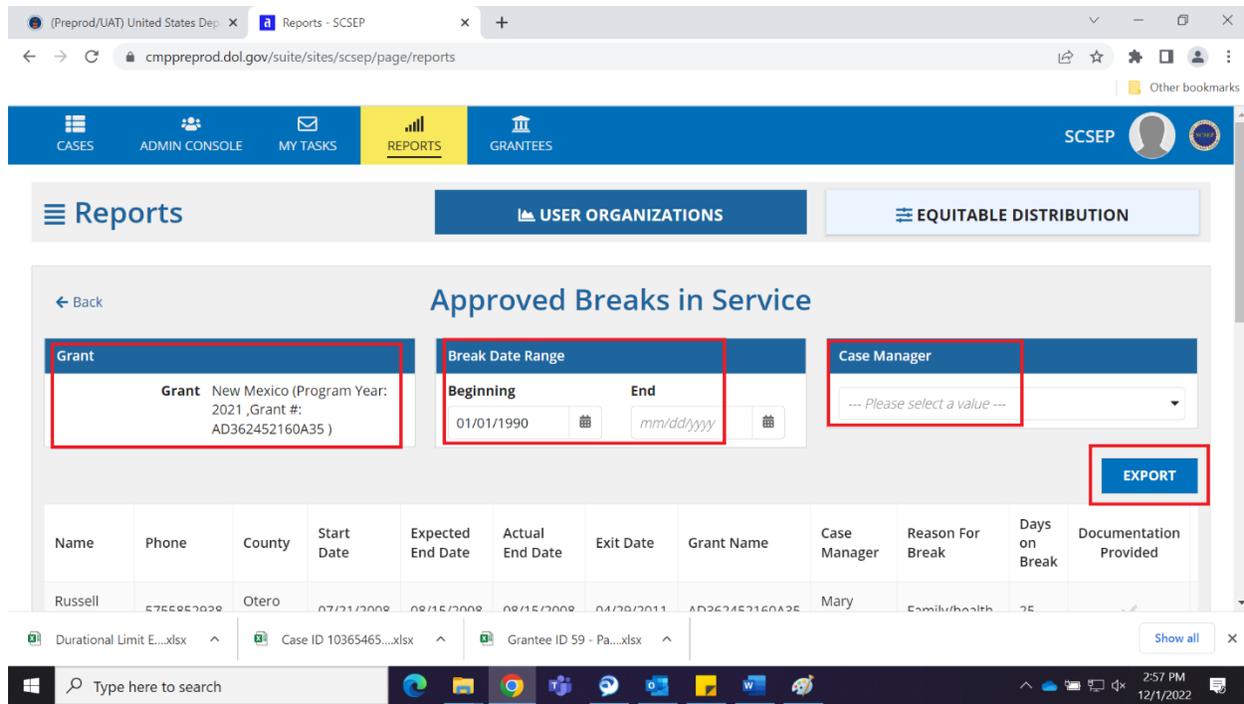
**USER ORGANIZATION FILTERS**

<b>Nationwide</b> <input type="radio"/> Yes <input checked="" type="radio"/> No	<b>Grantee*</b> --Select a Grantee--	<b>Sub-Grantee</b> --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**

## 1.2 Approved Breaks in Service



The screenshot shows a web application interface for SCSEP. The top navigation bar includes 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS' (highlighted), and 'GRANTEES'. The main content area is titled 'Reports' and contains a sub-section 'Approved Breaks in Service'. This section has three filter boxes: 'Grant' (pre-filled with 'New Mexico (Program Year: 2021 ,Grant #: AD362452160A35)'), 'Break Date Range' (with 'Beginning' set to '01/01/1990' and 'End' as a date picker), and 'Case Manager' (a dropdown menu). An 'EXPORT' button is located to the right of the filters. Below the filters is a table with columns: Name, Phone, County, Start Date, Expected End Date, Actual End Date, Exit Date, Grant Name, Case Manager, Reason For Break, Days on Break, and Documentation Provided. The first row shows 'Russell' with phone '5755957029', county 'Otero', start date '07/31/2008', expected end date '08/15/2008', actual end date '08/15/2008', exit date '04/26/2011', grant name 'AD362452160A35', case manager 'Mary', reason 'Family/health', and days on break '25'. The bottom of the screen shows a Windows taskbar with the time '2:57 PM 12/1/2022'.

This report can be filtered by the following

- **Grant:** This field is pre-filled 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 pre-filled 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.

Browser tabs: (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

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	✓	✓

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

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

Browser tabs: (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

Sub-navigation: Reports USER ORGANIZATIONS **EQUITABLE DISTRIBUTION**

Section: Approved Breaks in Service

Filters:

- 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	✓

Taskbar: Type here to search 9:35 AM 12/2/2022

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

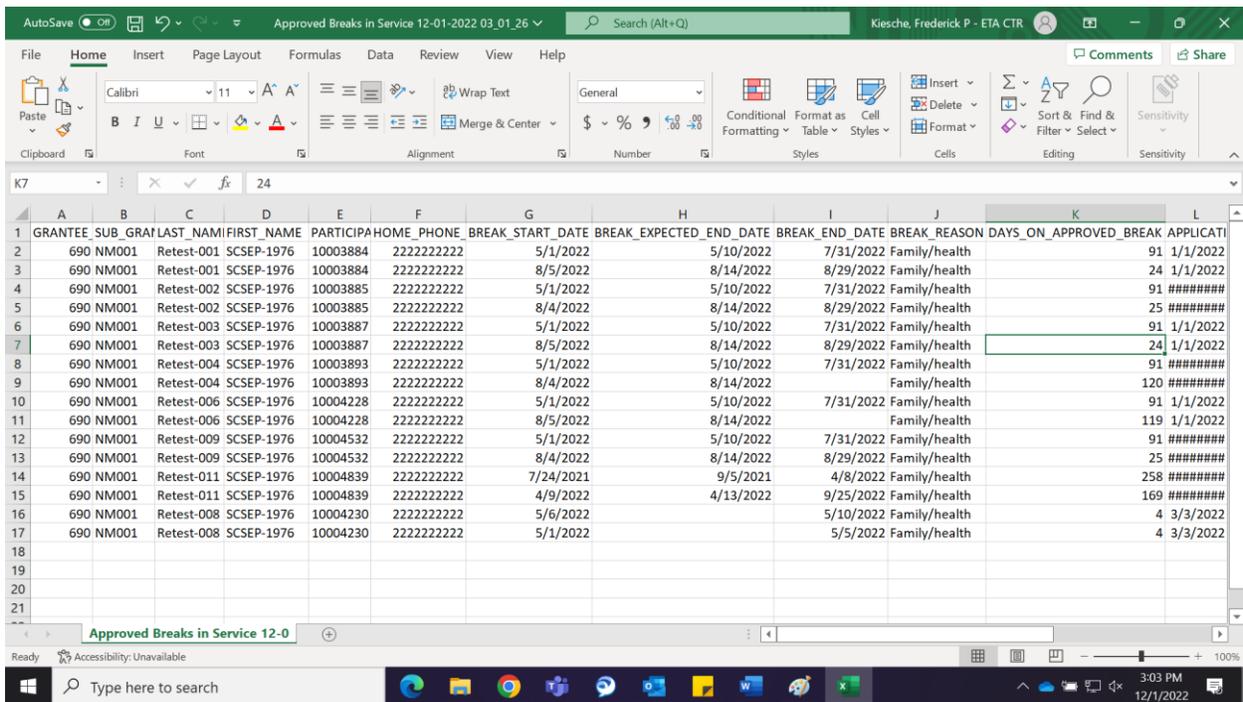
## Report Confirmation

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](#)

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

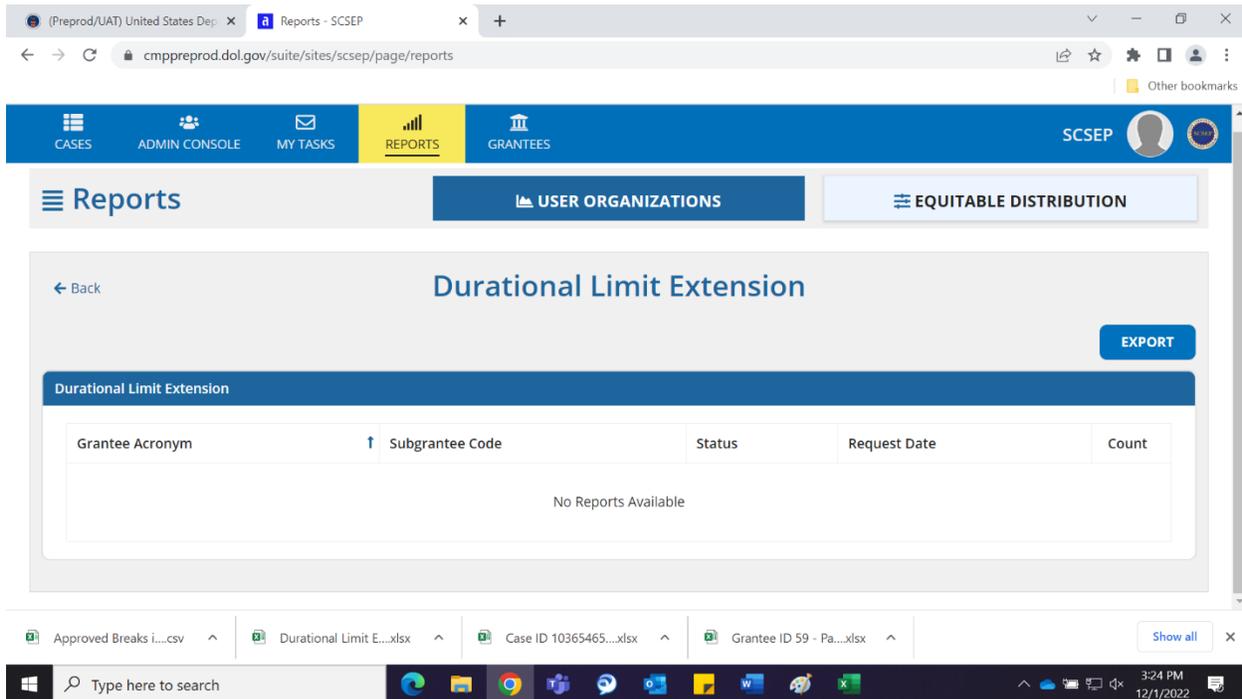
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



GRANTEE	SUB_GRA	LAST_NAME	FIRST_NAME	PARTICIPATION	HOME_PHONE	BREAK_START_DATE	BREAK_EXPECTED_END_DATE	BREAK_END_DATE	BREAK_REASON	DAYS_ON_APPROVED	BREAK_APPLICATION_DATE
690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	#####
690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	#####
690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	#####
690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	8/4/2022	8/14/2022		Family/health	120	#####
690	NM001	Retest-006	SCSEP-1976	10004228	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
690	NM001	Retest-006	SCSEP-1976	10004228	2222222222	8/5/2022	8/14/2022		Family/health	119	1/1/2022
690	NM001	Retest-009	SCSEP-1976	10004532	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	#####
690	NM001	Retest-009	SCSEP-1976	10004532	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	#####
690	NM001	Retest-011	SCSEP-1976	10004839	2222222222	7/24/2021	9/5/2021	4/8/2022	Family/health	258	#####
690	NM001	Retest-011	SCSEP-1976	10004839	2222222222	4/9/2022	4/13/2022	9/25/2022	Family/health	169	#####
690	NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/6/2022		5/10/2022	Family/health	4	3/3/2022
690	NM001	Retest-008	SCSEP-1976	10004230	2222222222	5/1/2022		5/5/2022	Family/health	4	3/3/2022

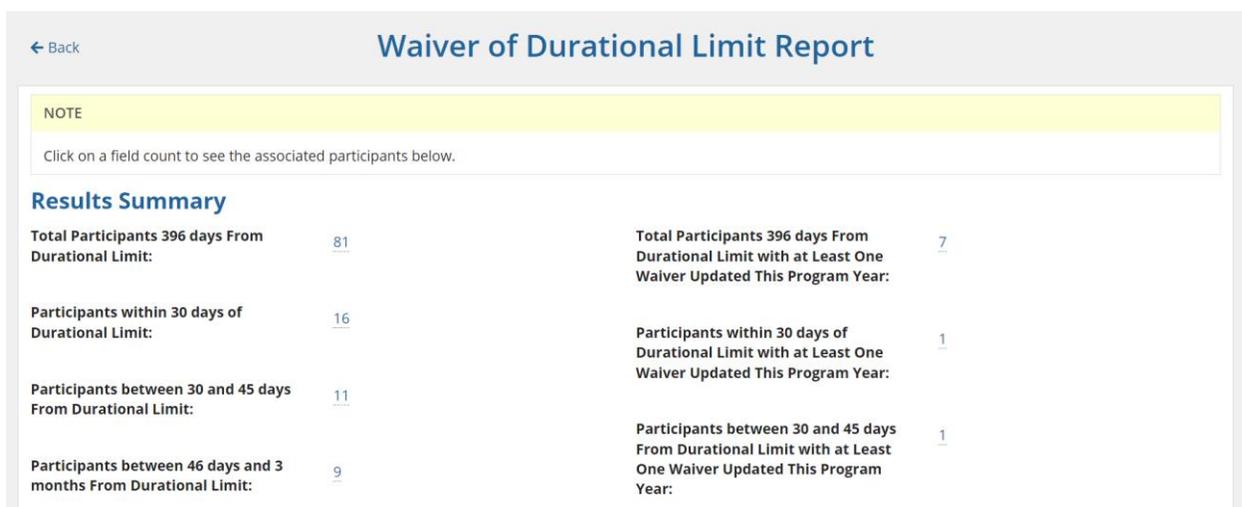
Clicking the **CLOSE** button in this (or any other report screen) will bring you back to the initial Reports tab screen.

### 1.3 Durational Limit Extension



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports`. The application header includes navigation tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (active), and GRANTEES. The main content area is titled "Durational Limit Extension" and features an "EXPORT" button. Below the title is a table with the following columns: Grantee Acronym, Subgrantee Code, Status, Request Date, and Count. The table is currently empty, displaying the message "No Reports Available".

### 1.4 Waiver of Durational Limit Report



The screenshot shows the "Waiver of Durational Limit Report" page. It includes a "NOTE" section with the text: "Click on a field count to see the associated participants below." Below this is a "Results Summary" table with two columns of data.

Results Summary		Results Summary	
Total Participants 396 days From Durational Limit:	<a href="#">81</a>	Total Participants 396 days From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">7</a>
Participants within 30 days of Durational Limit:	<a href="#">16</a>	Participants within 30 days of Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">1</a>
Participants between 30 and 45 days From Durational Limit:	<a href="#">11</a>	Participants between 30 and 45 days From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">1</a>
Participants between 46 days and 3 months From Durational Limit:	<a href="#">9</a>		

Participants between 3 and 6 months From Durational Limit:	<a href="#">11</a>	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:	<a href="#">13</a>	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:	<a href="#">21</a>	Participants between 6 and 9 months From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">3</a>
Participants 1 Quarter From Durational Limit:	<a href="#">11</a>	Participants between 9 and 13 months From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">2</a>
Participants 2 Quarters From Durational Limit:	<a href="#">11</a>	Participants 1 Quarter From Durational Limit with at Least One Waiver Updated This Program Year:	0
Participants 3 Quarters From Durational Limit:	<a href="#">13</a>	Participants 2 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">1</a>
Participants 4 Quarters From Durational Limit:	<a href="#">12</a>	Participants 3 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">3</a>
		Participants 4 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">1</a>

[EXPORT](#)

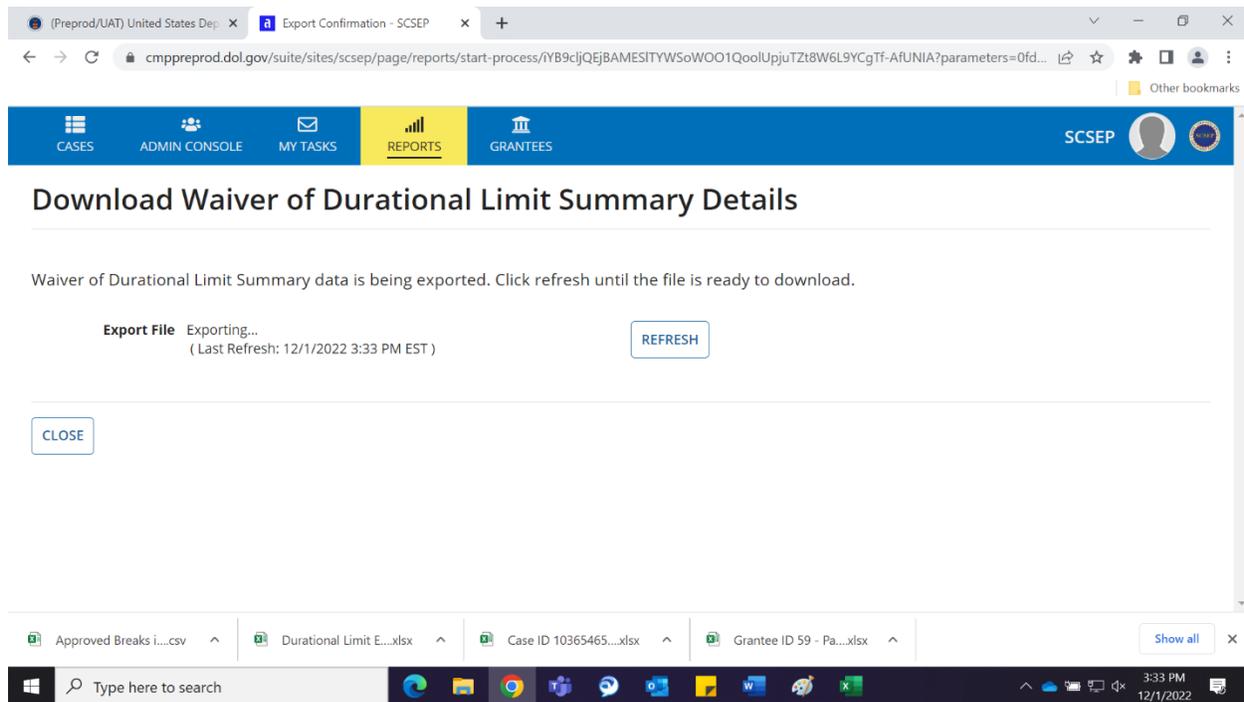
This report is generated based on the combination of Grantee and Sub-Grantee that you selected. For each category (for example Participants 1 Quarter From Durational Limit) you'll see a number (field count). Clicking on that number will display the details for those Participants matching the limit you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

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

Participants 4 Quarters From Durational Limit:	<a href="#">12</a>	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:	<a href="#">1</a>
		Participants 3 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">3</a>
		Participants 4 Quarters From Durational Limit with at Least One Waiver Updated This Program Year:	<a href="#">1</a>

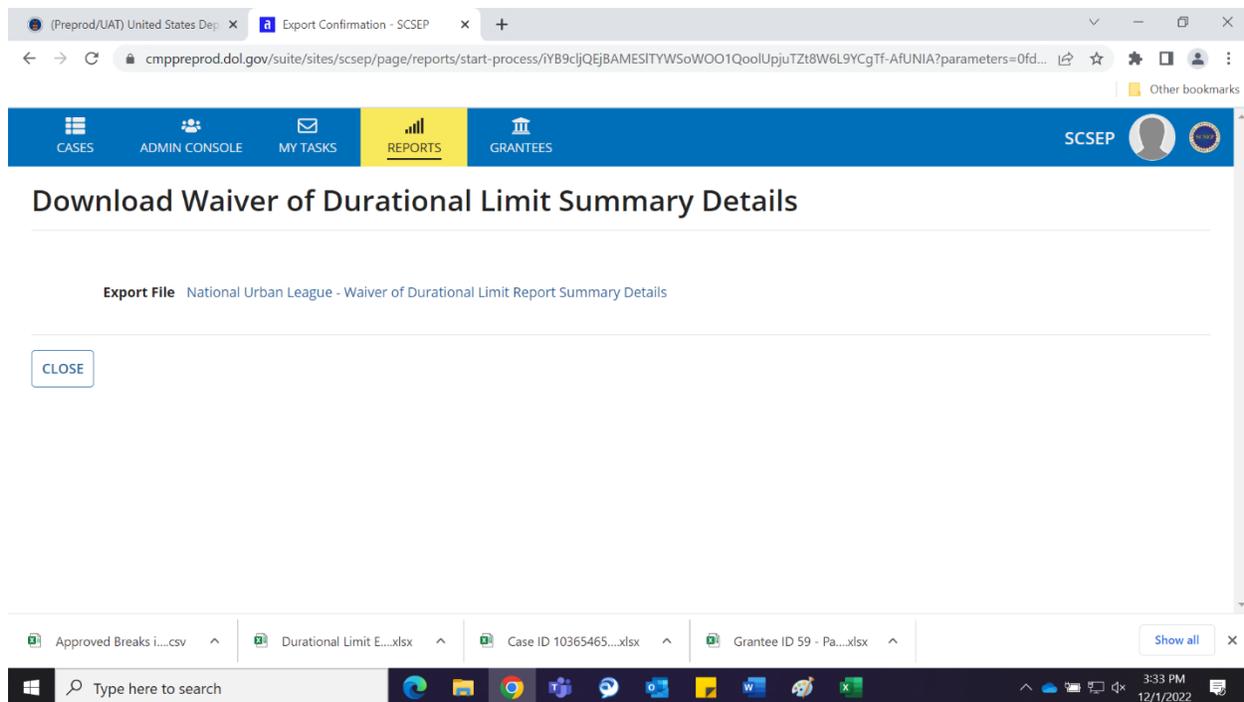
[EXPORT](#)

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



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/fYB9cjQEjBAMESITYWSoWOO1QoolUpjuTZt8W6L9YCgTF-AfUNIA?parameters=0fd...`. The page title is "Download Waiver of Durational Limit Summary Details". The main content area displays "Export File Exporting..." with a subtext "( Last Refresh: 12/1/2022 3:33 PM EST )" and a "REFRESH" button. A "CLOSE" button is also visible. The browser's taskbar shows several open files: "Approved Breaks i...csv", "Durational Limit E...xlsx", "Case ID 10365465...xlsx", and "Grantee ID 59 - Pa...xlsx". The system tray shows the time as 3:33 PM on 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.



The screenshot shows the same SCSEP Reports page, but now the "Export File" section displays the file name "National Urban League - Waiver of Durational Limit Report Summary Details". The "REFRESH" button is no longer present, and a "CLOSE" button is visible. The browser's taskbar shows the same open files as the previous screenshot, but the "Grantee ID 59 - Pa...xlsx" file is now highlighted. The system tray shows the time as 3:33 PM on 12/1/2022.

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

	A	B	C
1	Total_Participants_396_days_From_Durational_Limit	81	
2	Participants_within_30_days_of_Durational_Limit	16	
3	Participants_between_30_and_45_days_From_Durational_Limit	11	
4	Participants_between_46_days_and_3_months_From_Durational_Limit	9	
5	Participants_between_3_and_6_months_From_Durational_Limit	11	
6	Participants_between_6_and_9_months_From_Durational_Limit	13	
7	Participants_between_9_and_13_months_From_Durational_Limit	21	
8	Participants_1_Quarter_From_Durational_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**

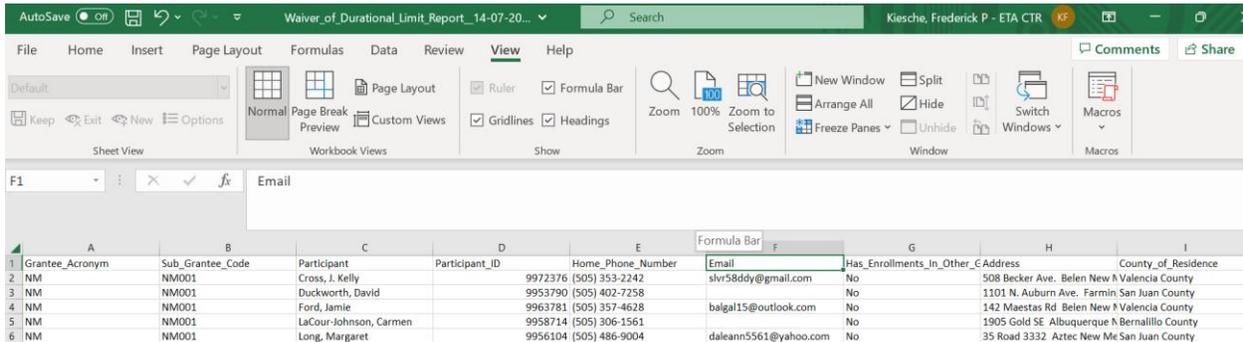
Click on the file name or right click on the file name to download a copy of the file to your default file location.

# 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	C_Address	County_of_Residence
NM	NM001	Cross, I. Kelly	9972376	(505) 353-2242	slvr58ddy@gmail.com	No	508 Becker Ave. Belen New N	Valencia County
NM	NM001	Duckworth, David	9953790	(505) 402-7258		No	1101 N. Auburn Ave. Farmin	San Juan County
NM	NM001	Ford, Jamie	9963781	(505) 357-4628	balgal15@outlook.com	No	142 Maestas Rd Belen New N	Valencia County
NM	NM001	LaCour-Johnson, Carmen	9958714	(505) 306-1561		No	1905 Gold SE Albuquerque	N Bernalillo County
NM	NM001	Long, Margaret	9956104	(505) 486-9004	daleann5561@yahoo.com	No	35 Road 3332 Artec New Me	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	
<b>Case Assigned To</b> Smith, Mary	<b>Race, American Indian or Alaskan Native</b> Participant did not self-identify	<b>Severe Disability</b>	<b>Limited English Proficiency</b>
<b>Age</b> 70	<b>Race, Asian</b> Participant did not self-identify	<b>Frail</b>	<b>Low Literacy Skills</b>
<b>Date of Birth</b> 12/26/1952	<b>Race, Black, African American</b> Participant did not self-identify	<b>Old Enough, Not Receiving SS Title II</b>	<b>75 or Older</b> No
<b>Gender</b> Male	<b>Race, Native Hawaiian/Pacific Islander</b> Participant did not self-identify	<b>Severly Ltd Emp Prospects</b>	<b>Formerly Incarcerated</b>
<b>Address</b> 508 Becker Ave. Belen New Mexico 87002	<b>Race, White</b> Yes		
<b>Email</b> slvr58ddy@gmail.com	<b>Ethnicity: Hispanic, Latino, or Spanish Origin?</b> No		
<b>Disability</b> No	<b>Has Enrollments In Other Grantees</b> None		
<b>Veteran Status</b> No			

**EXPORT**

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

<b>Email</b> slvr58ddy@gmail.com	Yes
<b>Disability</b> No	<b>Ethnicity: Hispanic, Latino, or Spanish Origin?</b> No
<b>Veteran Status</b> No	<b>Has Enrollments In Other Grantees</b> 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

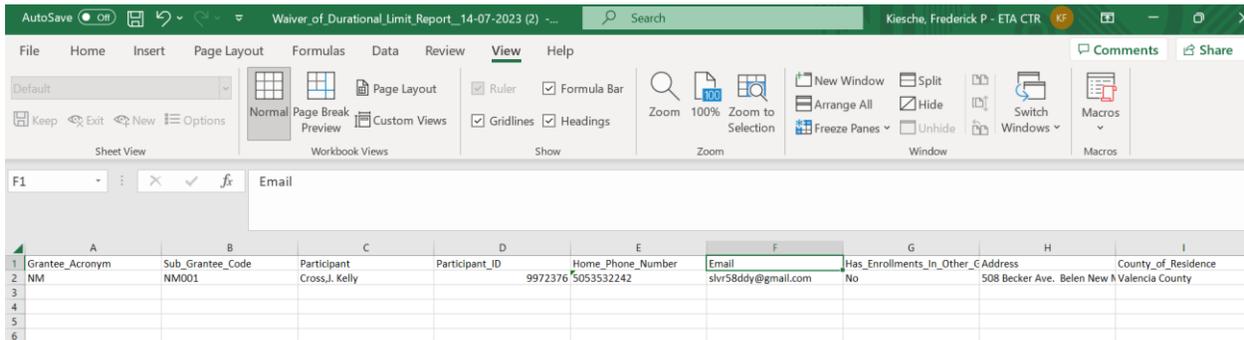
Click on the file name or right click on the file name to download a copy of the file to your default file location.

## 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.

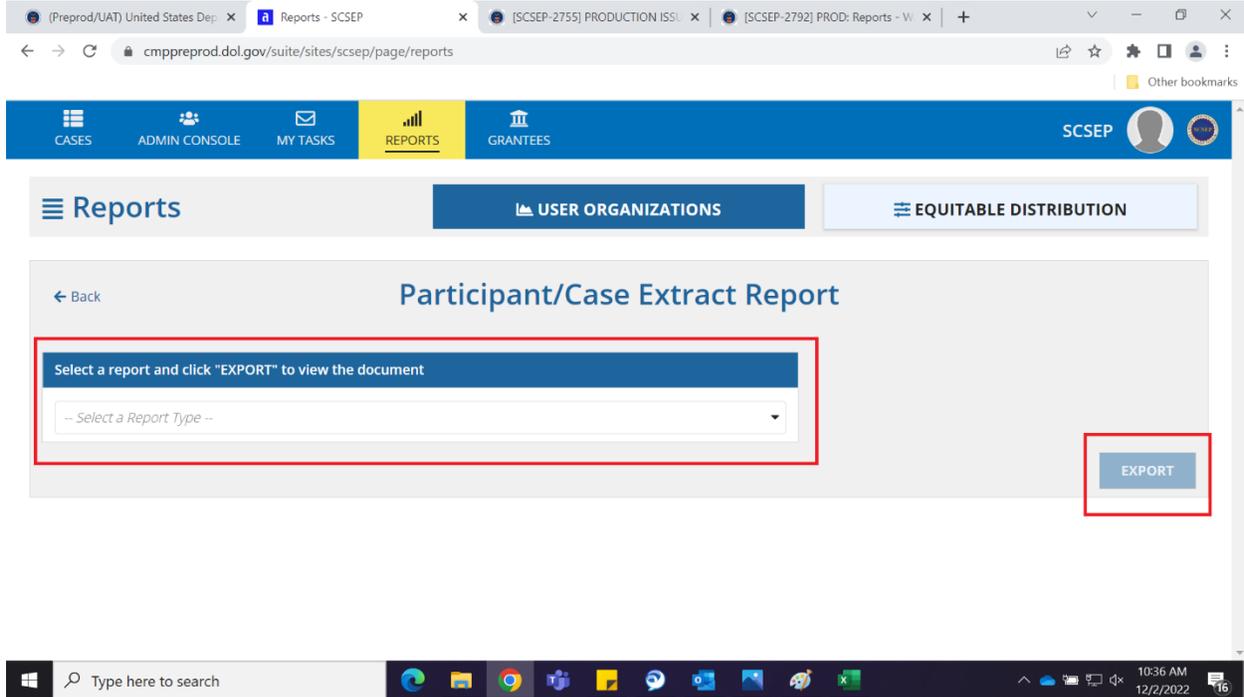


Grantee_Acronym	Sub_Grantee_Code	Participant	Participant_ID	Home_Phone_Number	Email	Has_Enrollments_In_Other_C	Address	County_of_Residence
NM	NM001	Cross,J. Kelly		9972376 5053532242	slvr58ddy@gmail.com	No	508 Becker Ave. Belen New	Valencia County

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

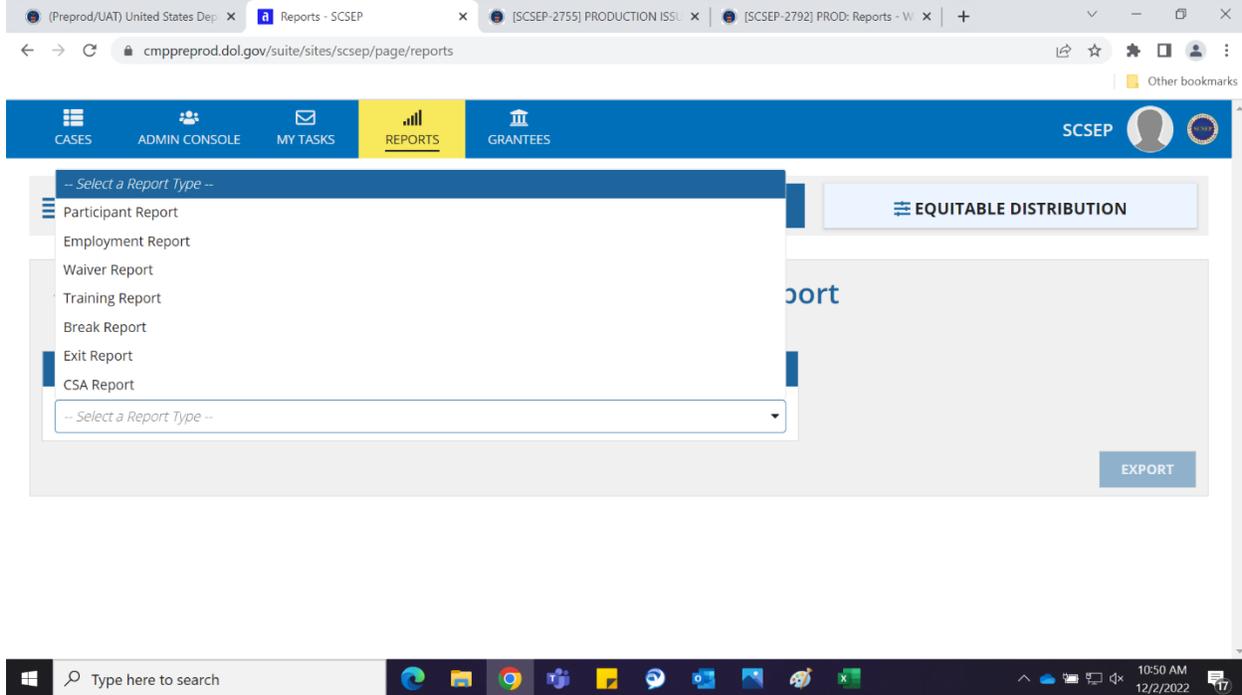


The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports`. The page features a blue navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. The main content area is titled "Participant/Case Extract Report" and includes a "Back" link. A dropdown menu is present with the text "Select a report and click 'EXPORT' to view the document" and a placeholder "-- Select a Report Type --". An "EXPORT" button is located to the right of the dropdown. The Windows taskbar at the bottom shows the search bar and various application icons, with the system clock displaying 10:36 AM on 12/2/2022.

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

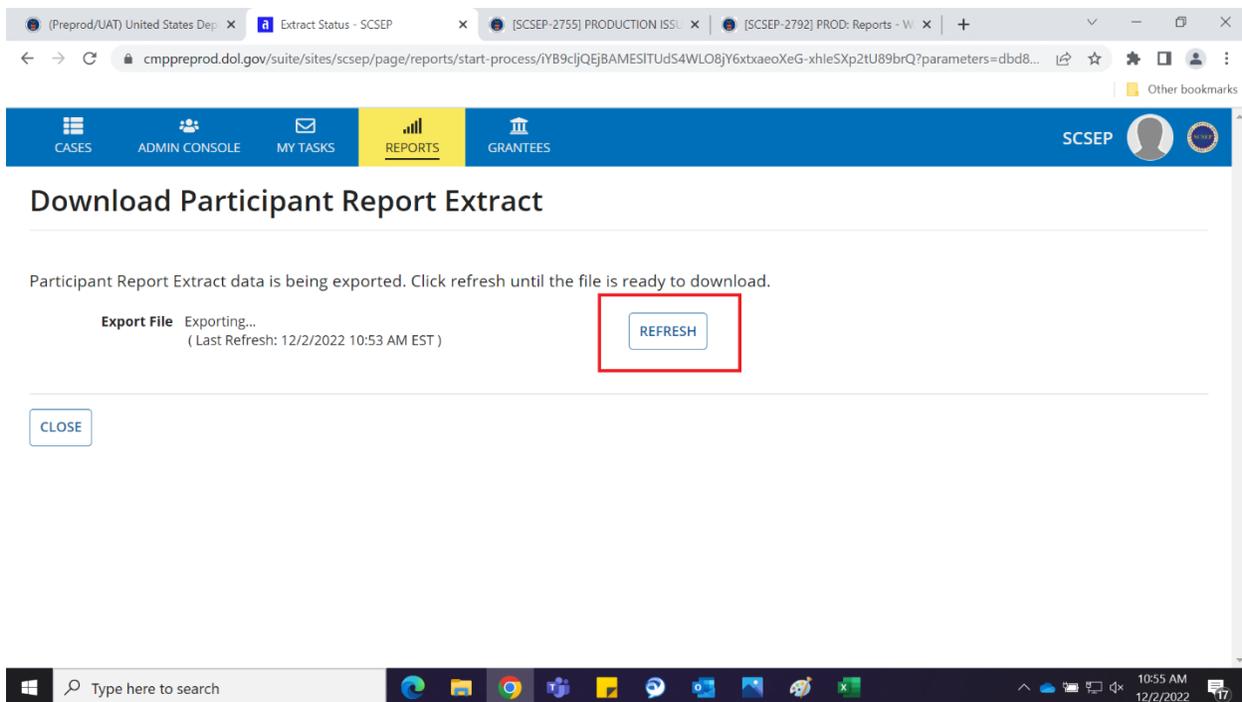
This report is actually several reports which can be chosen by selecting from the list that appears in the dropdown on the screen. You can select from among the following reports:

- 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.



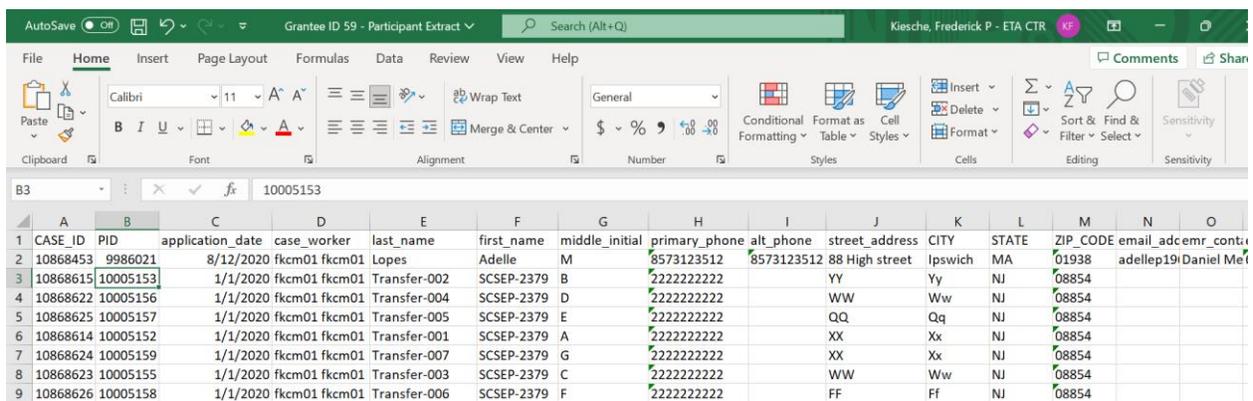
Click on the file name or right click on the file name to download a copy of the file to your default file location.

## Download Participant Report Extract

Export File [Grantee ID 59 - Participant Extract](#)

CLOSE

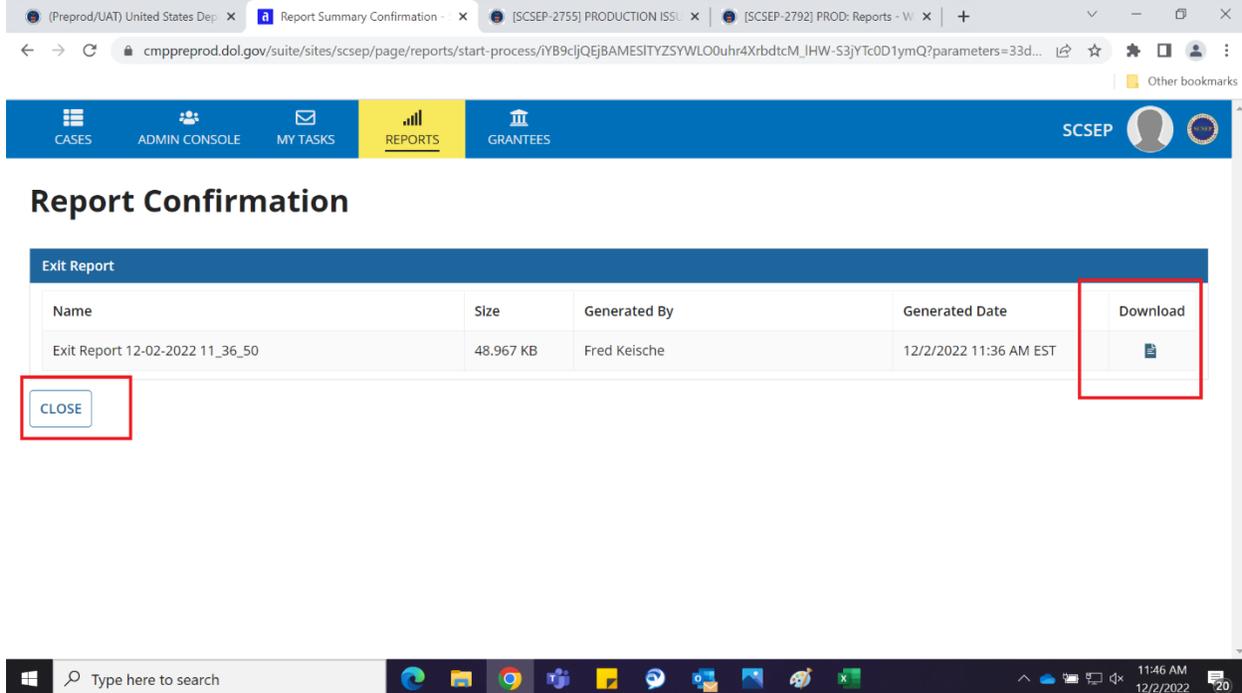
The Exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



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

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

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



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQEjBAMESITYZSYWLO0uhr4XrbdtcM_IHW-S3jYt0D1ymQ?parameters=33d...`. The page title is "Report Confirmation". A table lists report details:

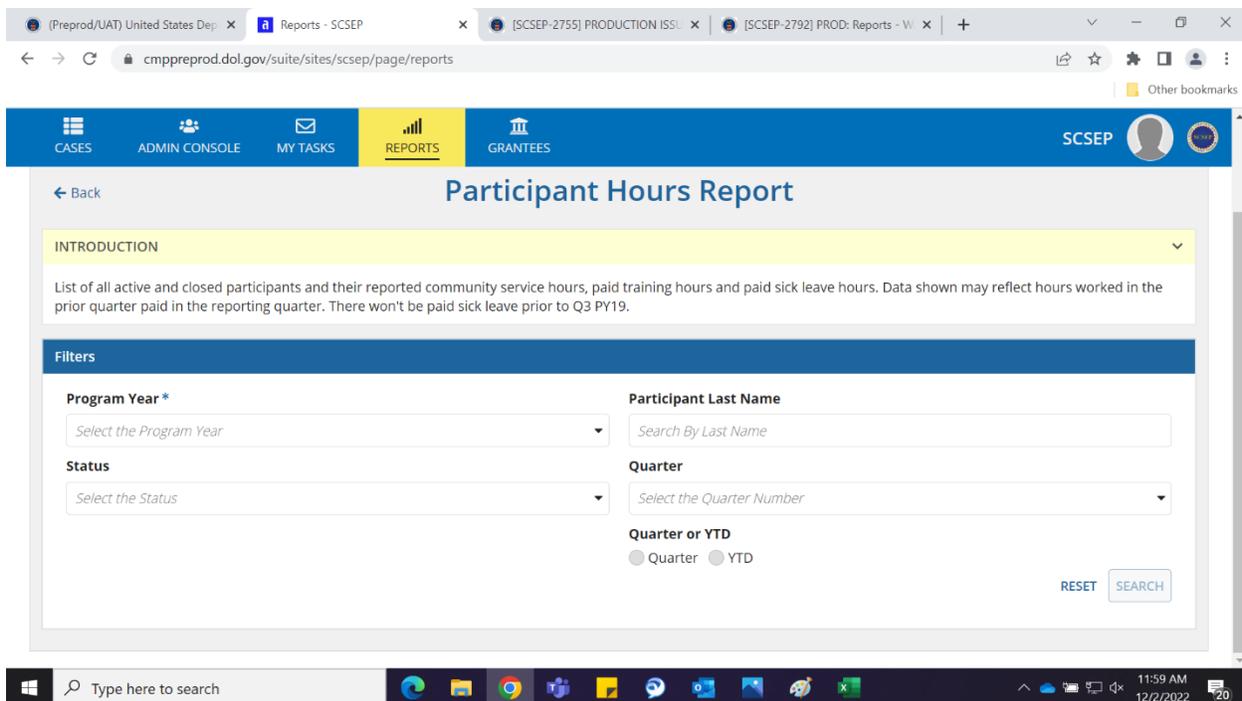
Name	Size	Generated By	Generated Date	Download
Exit Report 12-02-2022 11_36_50	48.967 KB	Fred Keische	12/2/2022 11:36 AM EST	

Below the table is a "CLOSE" button. The "Download" button and the "CLOSE" button are highlighted with red boxes in the original image.

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



The screenshot shows the "Participant Hours Report" page. It includes a "Back" button and an "INTRODUCTION" section with the following text: "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." Below the introduction is a "Filters" section with the following fields:

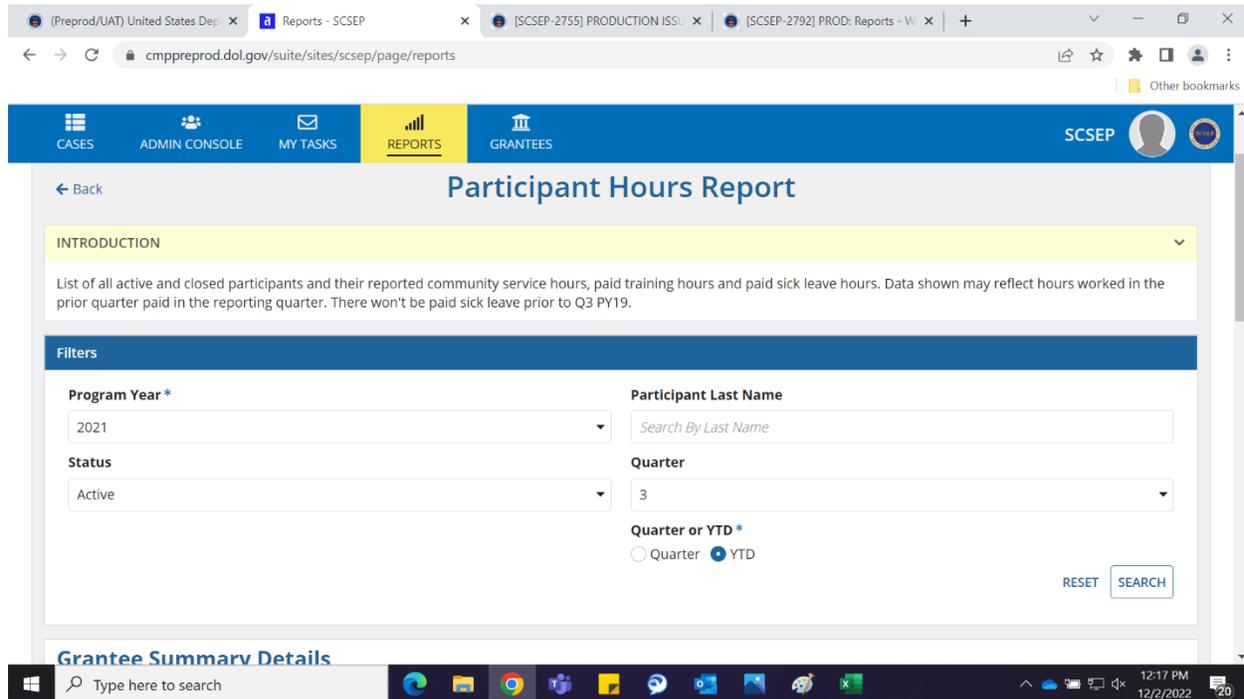
- Program Year\***:
- Status**:
- Participant Last Name**:
- Quarter**:
- Quarter or YTD**:  Quarter  YTD

At the bottom right of the filters section are "RESET" and "SEARCH" buttons.

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.



The screenshot shows the SCSEP Participant Hours Report interface. The navigation bar includes 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS', and 'GRANTEES'. The main content area is titled 'Participant Hours Report' and includes an 'INTRODUCTION' section. Below the introduction is a 'Filters' section with the following controls:

- Program Year\*:** A dropdown menu set to '2021'.
- Status:** A dropdown menu set to 'Active'.
- Participant Last Name:** A search box with the placeholder text 'Search By Last Name'.
- Quarter:** A dropdown menu set to '3'.
- Quarter or YTD\*:** Radio buttons for 'Quarter' and 'YTD', with 'YTD' selected.

Buttons for 'RESET' and 'SEARCH' are located at the bottom right of the filter section. Below the filters is a section titled 'Grantee Summary Details'.

Choose desired filters and click **SEARCH**.

Grantee Summary Details		
<b>Total Number of Enrollments</b>	<b>Number of Enrollments with PRA Hours</b>	<b>Number of Enrollments with Paid In-Person Training</b>
10	0	1
<b>Total Number of Active Enrollments</b>	<b>Number of Enrollments with Paid In-Person CSA Hours</b>	<b>Number of Enrollments with Paid Remote Training</b>
10	4	0
<b>Total Number of Closed Enrollments</b>	<b>Number of Enrollments with Paid Remote CSA Hours</b>	<b>Number of Enrollments with Paid Sick Leave</b>
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**.

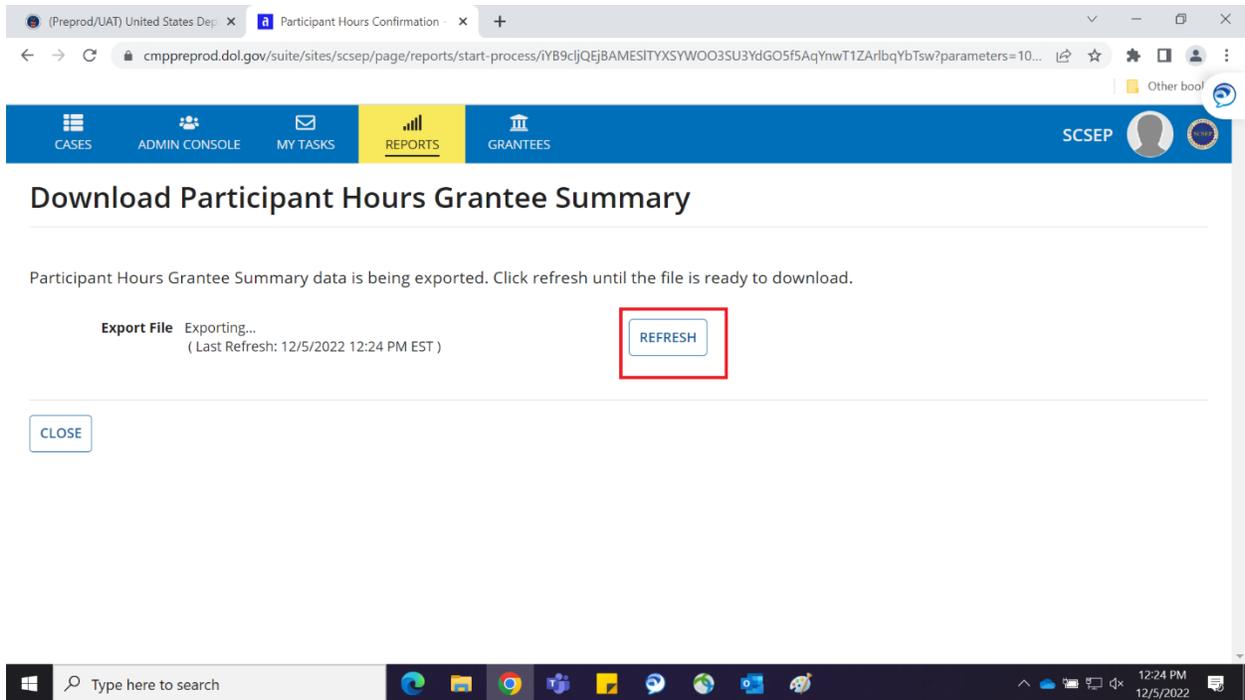
### Grantee Summary Hours Table

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/YB9cjQEjBAMESITYXSYWOO3SU3YdGOSf5AqYmwT1ZArIbqYbTsw?parameters=10...

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.

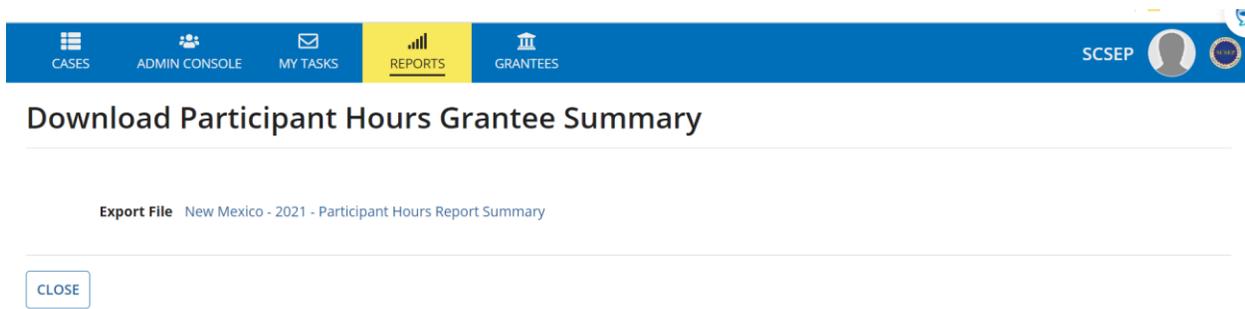
**Export File** Exporting...  
(Last Refresh: 12/5/2022 12:24 PM EST)

**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.



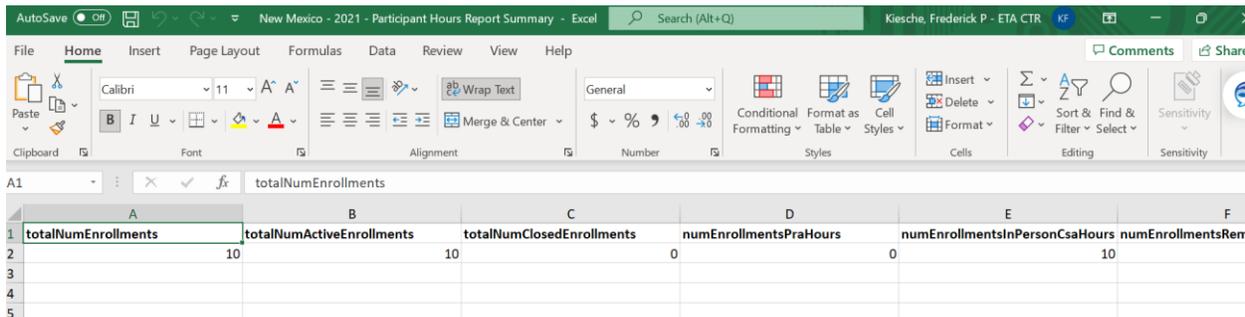
CASES ADMIN CONSOLE MY TASKS **REPORTS** GRANTEES SCSEP

## 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.

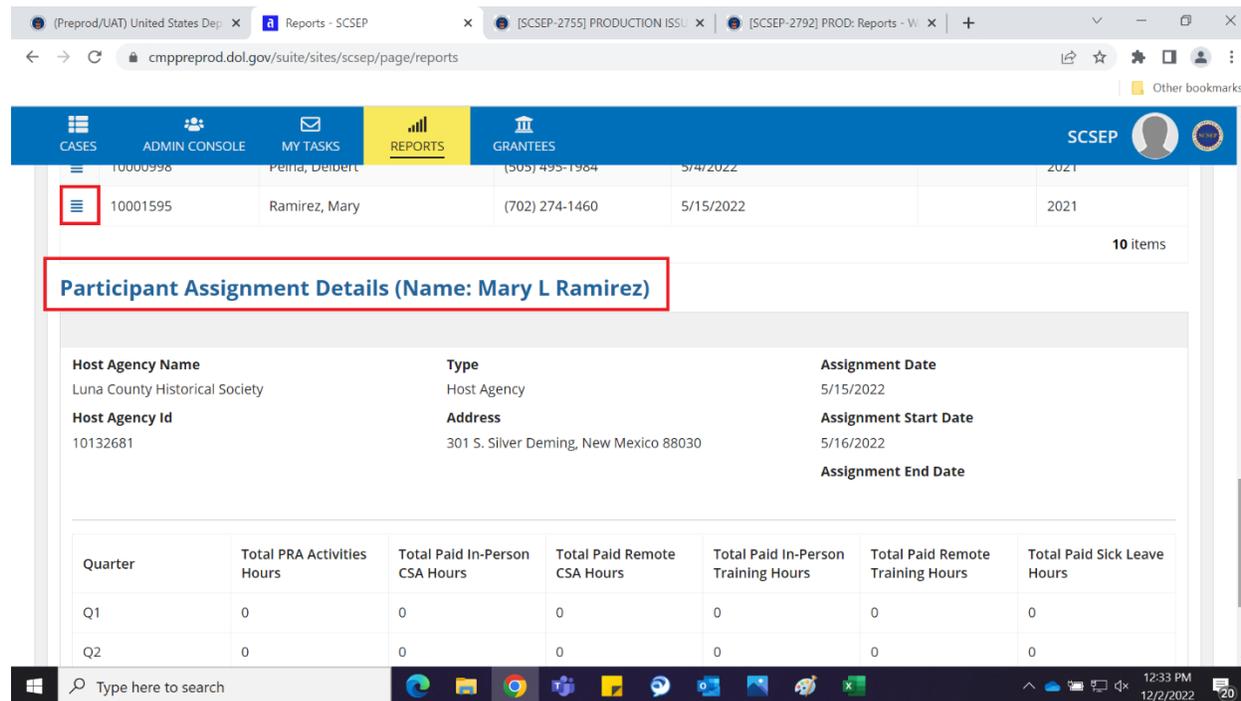


totalNumEnrollments					
A	B	C	D	E	F
totalNumEnrollments	totalNumActiveEnrollments	totalNumClosedEnrollments	numEnrollmentsPraHours	numEnrollmentsInPersonCsaHours	numEnrollmentsRem
	10	10	0	0	10

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 blue navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS, and GRANTEES. The REPORTS tab is active. Below the navigation bar is a table of participants. The row for Mary L Ramirez (ID: 10001595) is highlighted with a red box. Below this row, a red box highlights the link "Participant Assignment Details (Name: Mary L Ramirez)".

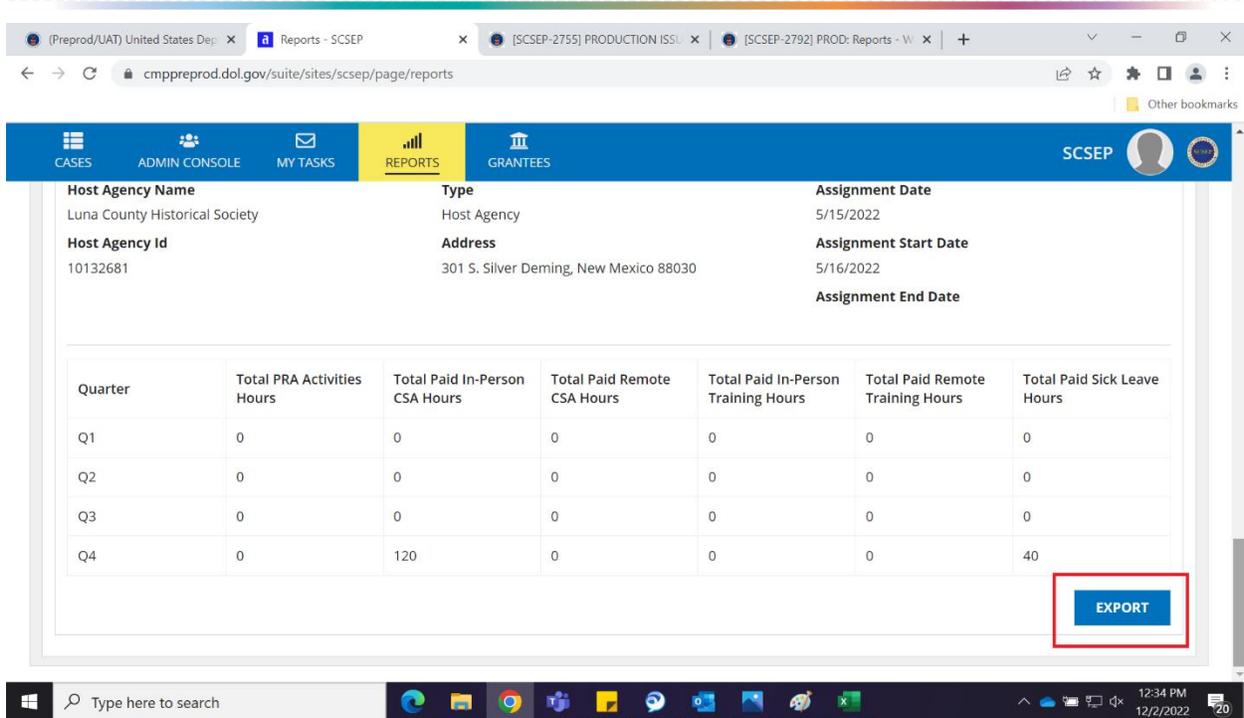
The details for Mary L Ramirez are as follows:

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

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 Participant’s report can be exported by clicking **EXPORT**.

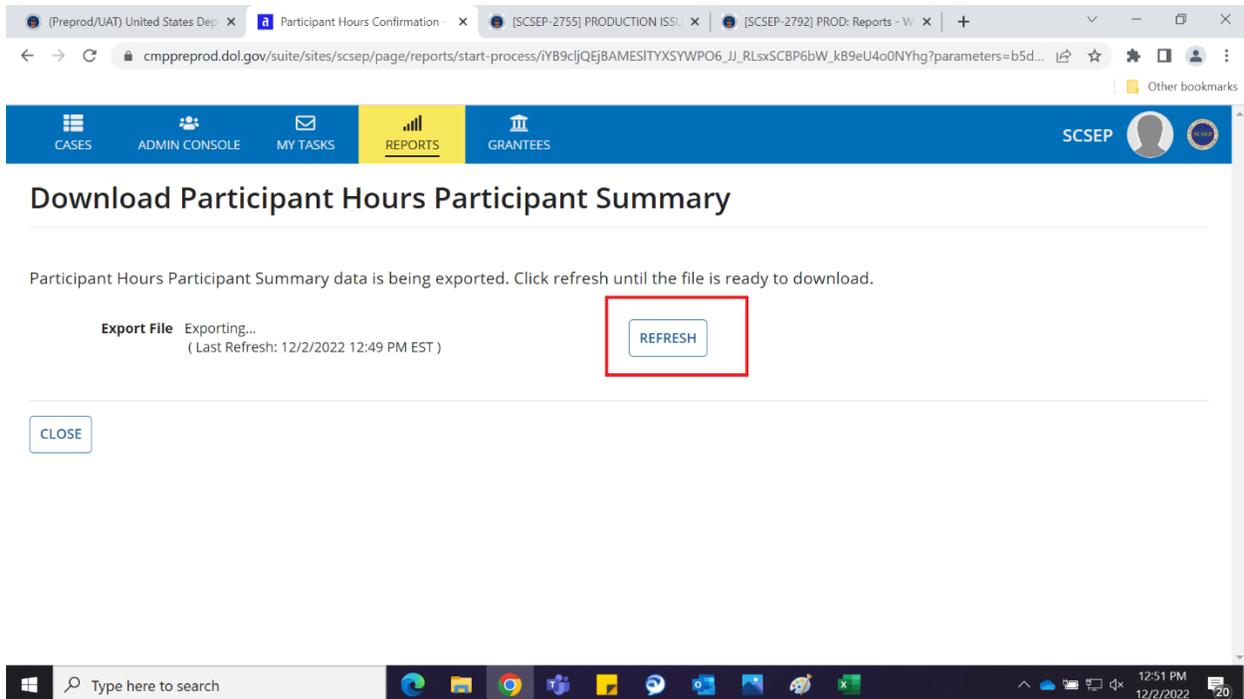


Host Agency Name: Luna County Historical Society  
 Host Agency Id: 10132681  
 Type: Host Agency  
 Address: 301 S. Silver Deming, New Mexico 88030  
 Assignment Date: 5/15/2022  
 Assignment Start Date: 5/16/2022  
 Assignment End Date: [Blank]

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**

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



Download Participant Hours Participant Summary

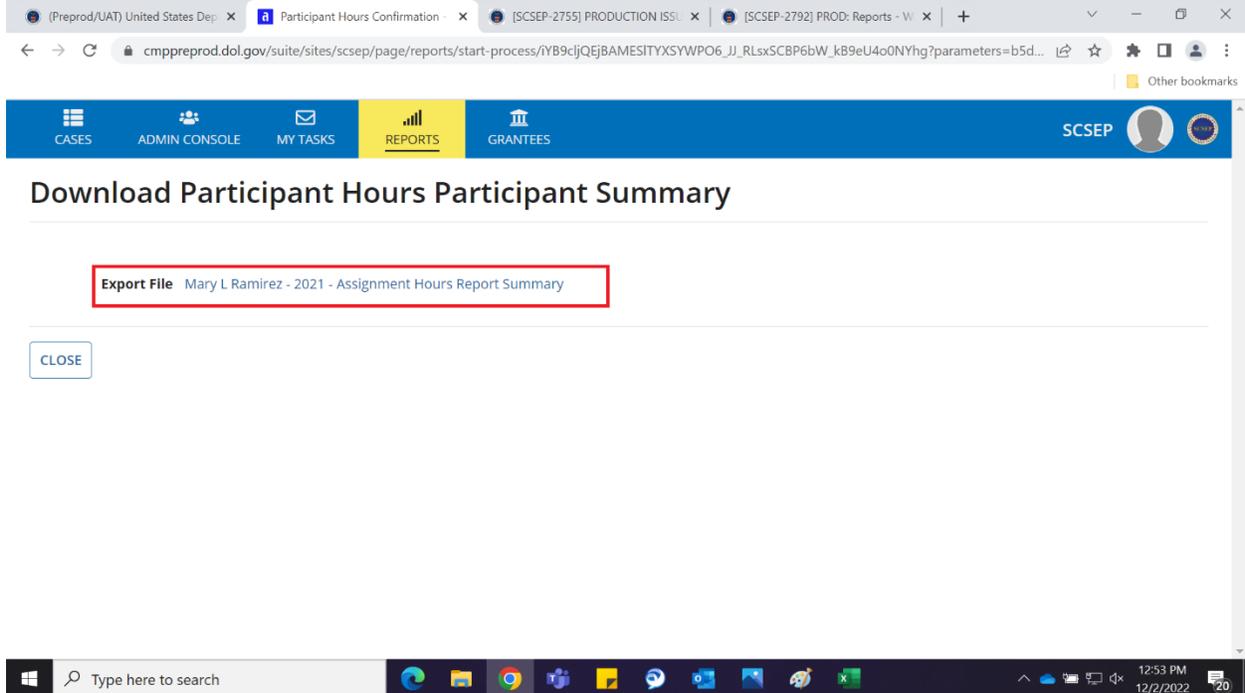
Participant Hours Participant Summary data is being exported. Click refresh until the file is ready to download.

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

**REFRESH**

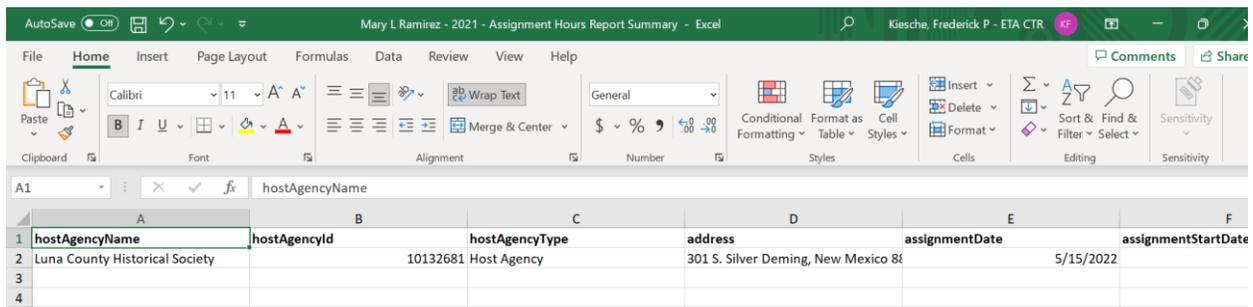
**CLOSE**

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



The screenshot shows a web browser window with several tabs. The active tab is titled "[SCSEP-2755] PRODUCTION ISSU...". The browser address bar shows a URL from "cmppreprod.dol.gov". The application's navigation bar includes "CASES", "ADMIN CONSOLE", "MY TASKS", "REPORTS" (highlighted), and "GRANTEES". A user profile icon for "SCSEP" is visible in the top right. The main content area displays the heading "Download Participant Hours Participant Summary". Below this, a red-bordered box contains the text "Export File Mary L Ramirez - 2021 - Assignment Hours Report Summary". A "CLOSE" button is located below the export file link. The Windows taskbar at the bottom shows the time as 12:53 PM on 12/2/2022.

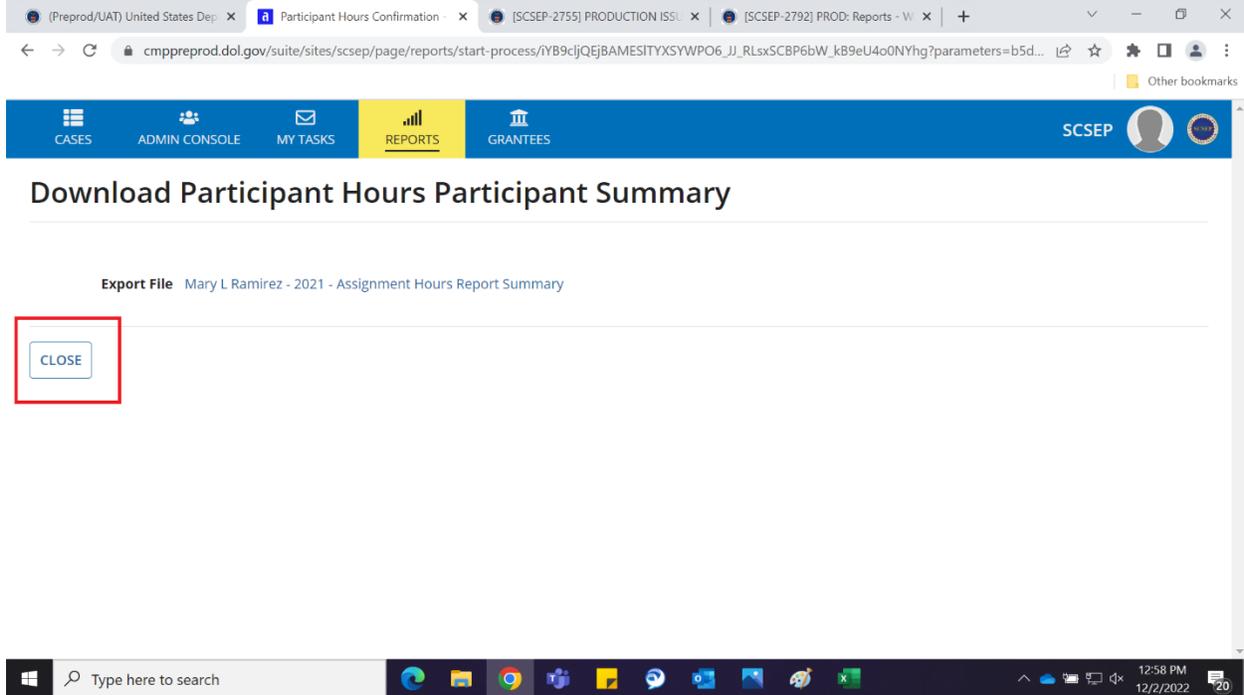
The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



The screenshot shows a Microsoft Excel spreadsheet titled "Mary L Ramirez - 2021 - Assignment Hours Report Summary - Excel". The spreadsheet contains the following data:

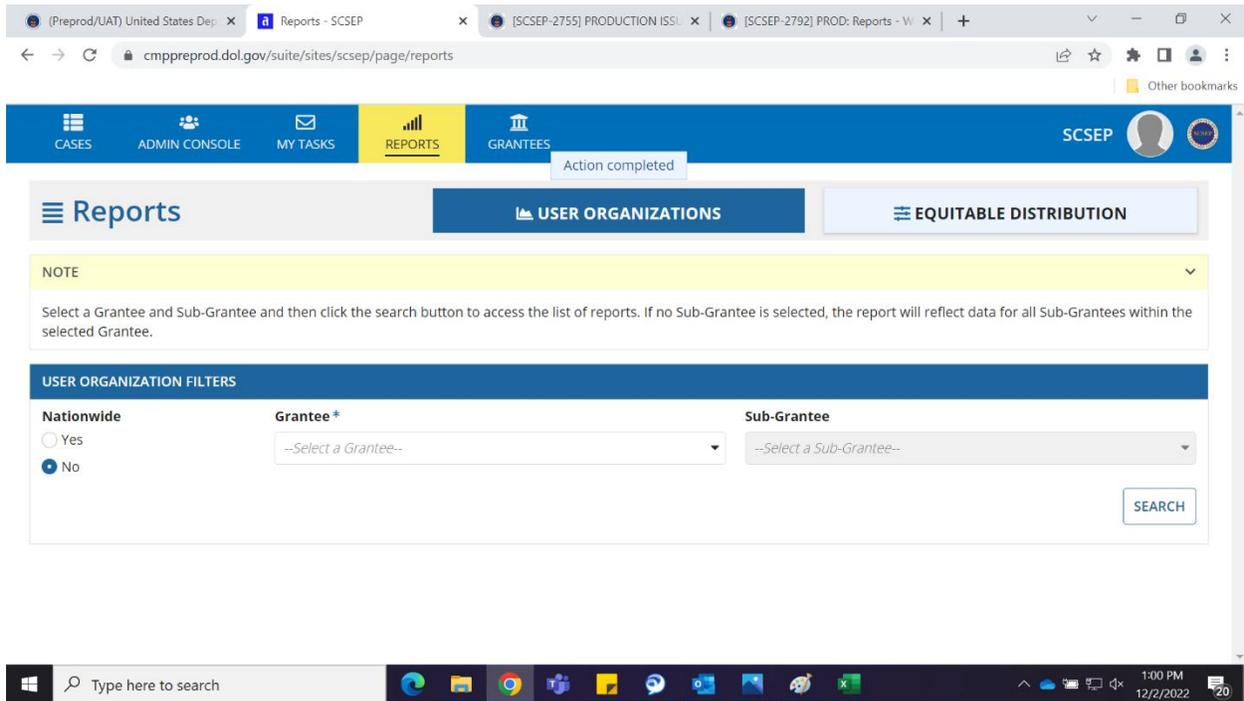
1	hostAgencyName	hostAgencyId	hostAgencyType	address	assignmentDate	assignmentStartDate
2	Luna County Historical Society	10132681	Host Agency	301 S. Silver Deming, New Mexico 8	5/15/2022	
3						
4						

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



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports/start-process/YB9cjQEjBAMESITYXSYWPO6_JJ_RLsxSCBP6bW_kB9eU4o0NYhg?parameters=b5d...`. The page title is "Download Participant Hours Participant Summary". Below the title, there is an "Export File" link for "Mary L Ramirez - 2021 - Assignment Hours Report Summary". A "CLOSE" button is highlighted with a red rectangular box. The navigation bar includes "CASES", "ADMIN CONSOLE", "MY TASKS", "REPORTS", and "GRANTEES". The user profile is identified as "SCSEP".

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



The screenshot shows the "Reports" section of the SCSEP application. The page title is "Reports". There are two main buttons: "USER ORGANIZATIONS" and "EQUITABLE DISTRIBUTION". A "NOTE" section contains the text: "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." Below this is the "USER ORGANIZATION FILTERS" section, which includes a "Nationwide" filter with radio buttons for "Yes" and "No" (selected), a "Grantee\*" dropdown menu with "--Select a Grantee--", and a "Sub-Grantee" dropdown menu with "--Select a Sub-Grantee--". A "SEARCH" button is located at the bottom right of the filters section. An "Action completed" notification is visible above the "EQUITABLE DISTRIBUTION" button. The navigation bar includes "CASES", "ADMIN CONSOLE", "MY TASKS", "REPORTS", and "GRANTEES". The user profile is identified as "SCSEP".

## 2.0 Actions

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

### 2.1 Participant Actions Report



The screenshot shows a web interface for the 'Participant Actions Report'. At the top, there is a navigation bar with 'Reports' on the left and two tabs: 'USER ORGANIZATIONS' (selected) and 'EQUITABLE DISTRIBUTION'. Below the navigation bar, there is a 'Back' link and the title 'Participant Actions Report'. A yellow section titled 'INTRODUCTION' contains the text: '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.' Below this is a 'Filters' section with a 'Show Results' heading. There are four checkboxes: 'IEP', 'Physical or Waiver', 'Recertification', and 'Safety Consultation'. To the right, there are two date pickers labeled 'Initial Assignment Date From' and 'Initial Assignment Date To', both with a placeholder 'mm/dd/yyyy' and a calendar icon. At the bottom right of the filter section, there are 'Reset' and 'Search' buttons.

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.

← 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
- Recertification
- Physical or Waiver
- Safety Consultation

**Initial Assignment Date From**

mm/dd/yyyy

**Initial Assignment Date To**

mm/dd/yyyy

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
- Recertification
- Physical or Waiver
- Safety Consultation

**Initial Assignment Date From**

mm/dd/yyyy

**Initial Assignment Date To**

mm/dd/yyyy

Reset | Search

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

**Show Results**

- IEP
- Recertification
- Physical or Waiver
- Safety Consultation

**Initial Assignment Date From**

mm/dd/yyyy

**Initial Assignment Date To**

mm/dd/yyyy

Reset | Search

**EXPORT**

### Summary Section

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

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

**Show Results**

IEP                       Physical or Waiver  
 Recertification            Safety Consultation

Initial Assignment Date From:

Initial Assignment Date To:

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

**EXPORT**

---

**Summary Section**

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

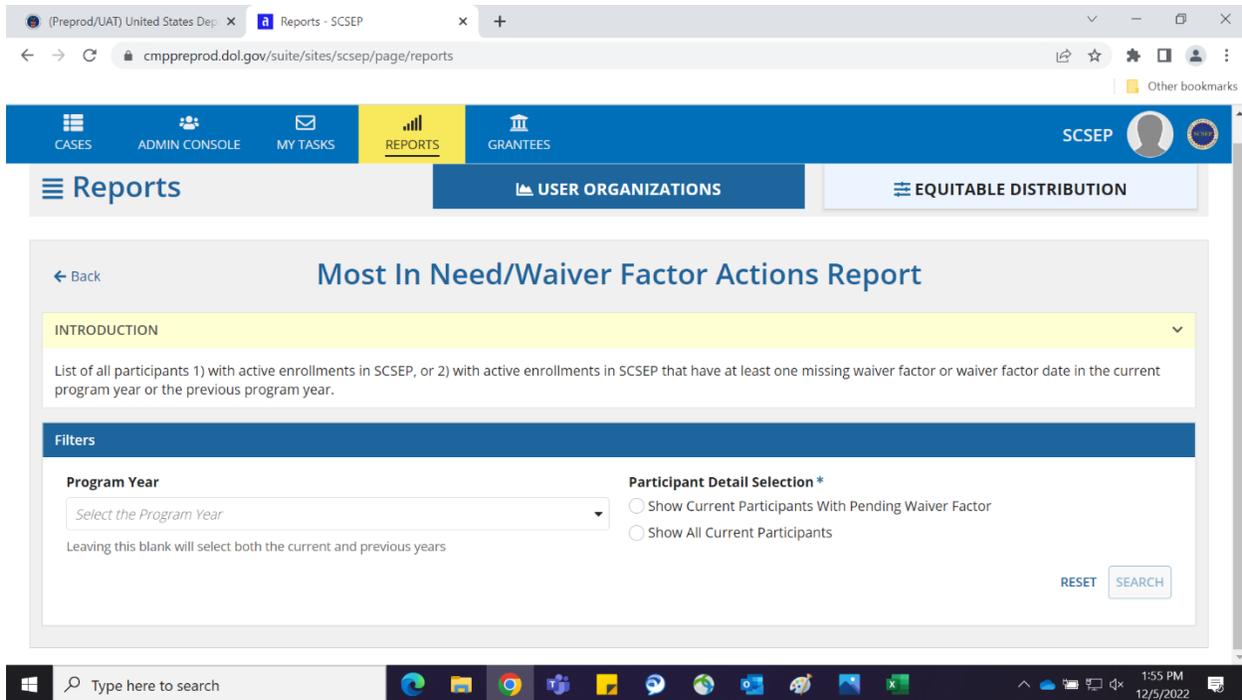
[CLOSE](#)

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.



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

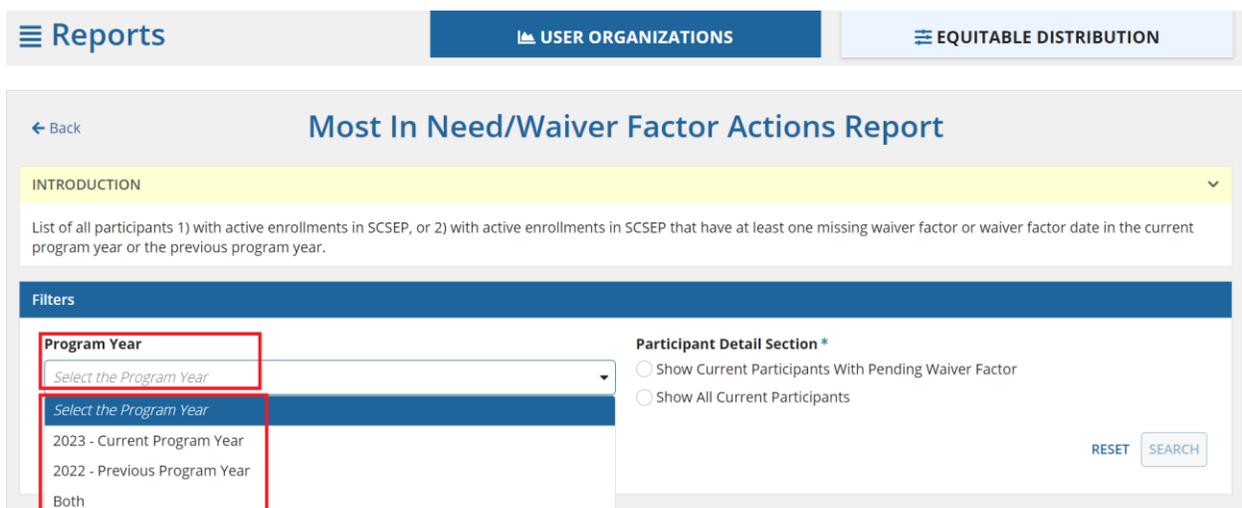
## 2.2 Most in Need/Waiver Factor Actions Report



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports`. The page header includes navigation tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. The main content area is titled "Most In Need/Waiver Factor Actions Report" and includes an "INTRODUCTION" section and a "Filters" section. The filters section contains a "Program Year" dropdown menu and a "Participant Detail Selection\*" section with two radio button options: "Show Current Participants With Pending Waiver Factor" and "Show All Current Participants". There are "RESET" and "SEARCH" buttons at the bottom right of the filters section.

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.



This close-up screenshot shows the "Program Year" dropdown menu expanded. The menu items are: "Select the Program Year", "2023 - Current Program Year", "2022 - Previous Program Year", and "Both". The "Both" option is highlighted in blue. The "Participant Detail Selection\*" section and "SEARCH" button are also visible in the background.

- **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

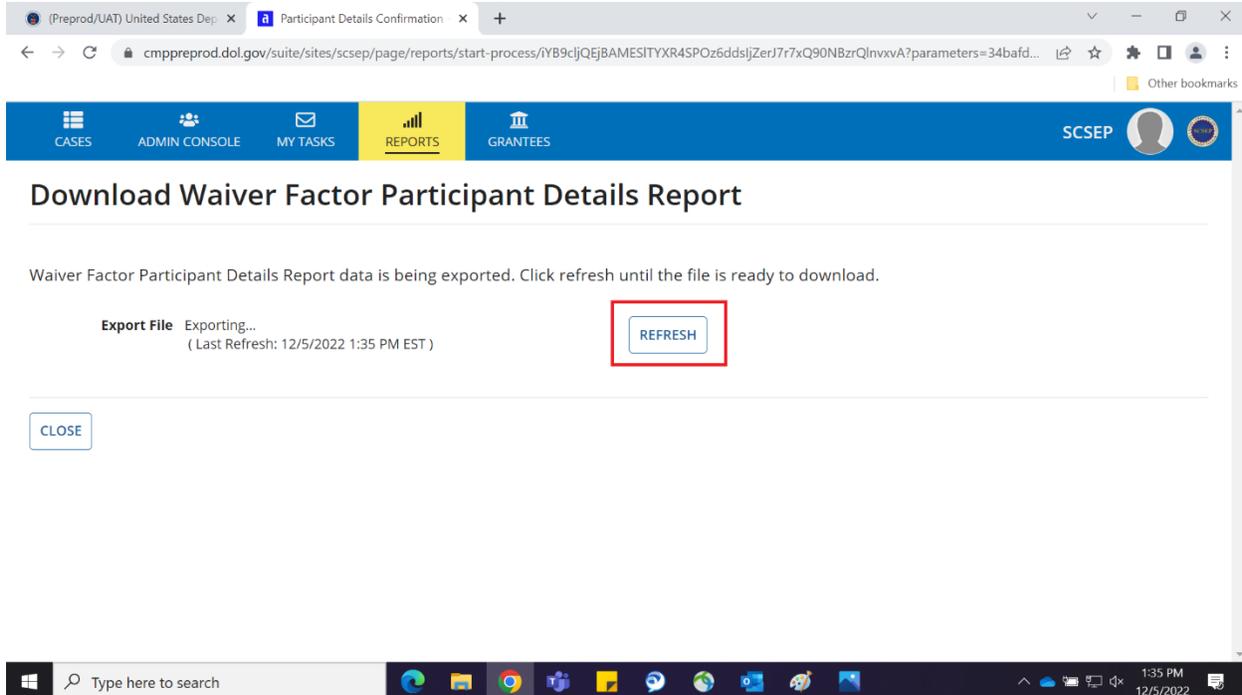
The Participant Table section of the report can be exported by clicking **EXPORT**.

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

EXPORT

Jamie L Ford PID: 9963781

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



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

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 Factor Participant Details Report

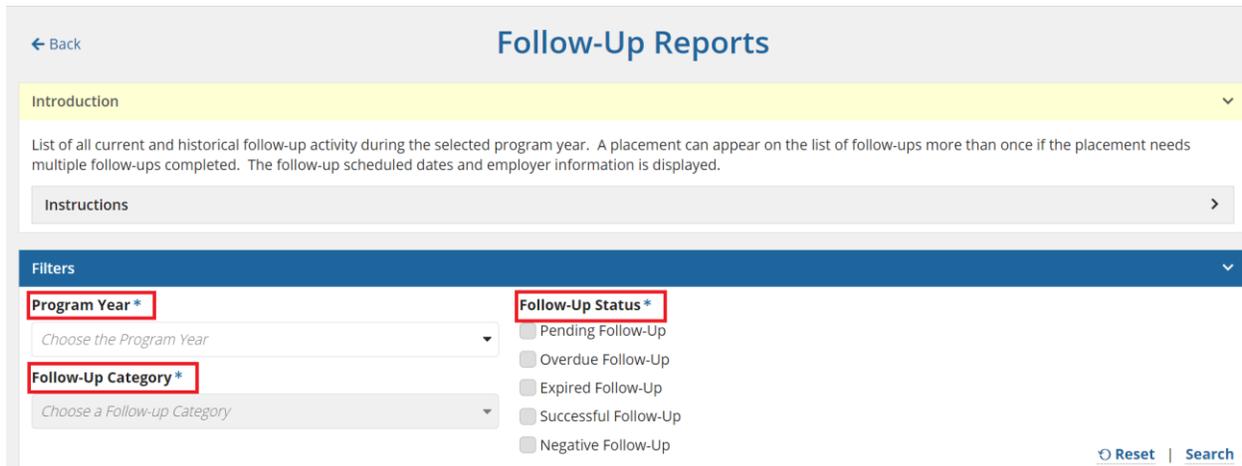
**Export File** MINWFA\_Report\_7/17/2023 9:25 AM EDT

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.

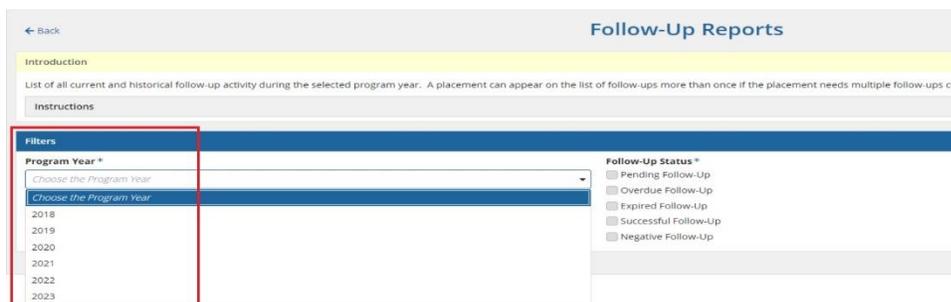


## 2.3 Follow-Up Reports



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

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



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

← 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**

<b>Count of Cases</b>	5	<b>Number of Expired Follow-ups</b>	0
<b>Number of Pending Follow-Ups</b>	0	<b>Number of Successful Follow-ups</b>	12
<b>Number of Overdue Follow-ups</b>	0	<b>Number of Negative Follow-ups</b>	0

Follow Up Report (2020)

**Follow Up Results Details**

Participant First Name	Participant Last Name	Participant ID	Participant Case ID	Participant Phone	Participant Email	Case Assigned To	Participant Exit Date	Follow-Up1 Scheduled Date	Follow-up1 Completed Date	Follow-Up 1 Status	Follow-Up2 Scheduled Date	Follow-up2 Completed Date	Follow-Up 2 Status	Follow-Up3 Scheduled Date	Follow-up3 Completed Date	Follow-Up 3 Status
Juana	Locasplino	9627806	10795608	(905) 495-5500		kgard01,kgard01	03/17/2021	7/1/2021	7/1/2021	Success	10/1/2021	12/29/2021	Success	1/1/2022	3/21/2022	Success

Follow Up Report (2020)

**Follow Up Results Details**

up1 Inted	Follow-Up1 Status	Follow-Up2 Scheduled Date	Follow-up2 Completed Date	Follow-Up 2 Status	Follow-Up3 Scheduled Date	Follow-up3 Completed Date	Follow-Up 3 Status	Employer	Address Line	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	10/1/2021	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	Mr. Gachuchal Carol	Acting Director	(505) 782-5544		3/18/2021	

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

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

← 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** >

**EXPORT**

**Summary** >

**Follow Up Report (2020)** >

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

**Filters** ▾

**Program Year\***  
 2020 ▾

**Follow-Up Category\***  
 All ▾

**Follow-Up Status\***

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

Reset | Search

**EXPORT**

**Summary** >

**Follow Up Report (2020)** >

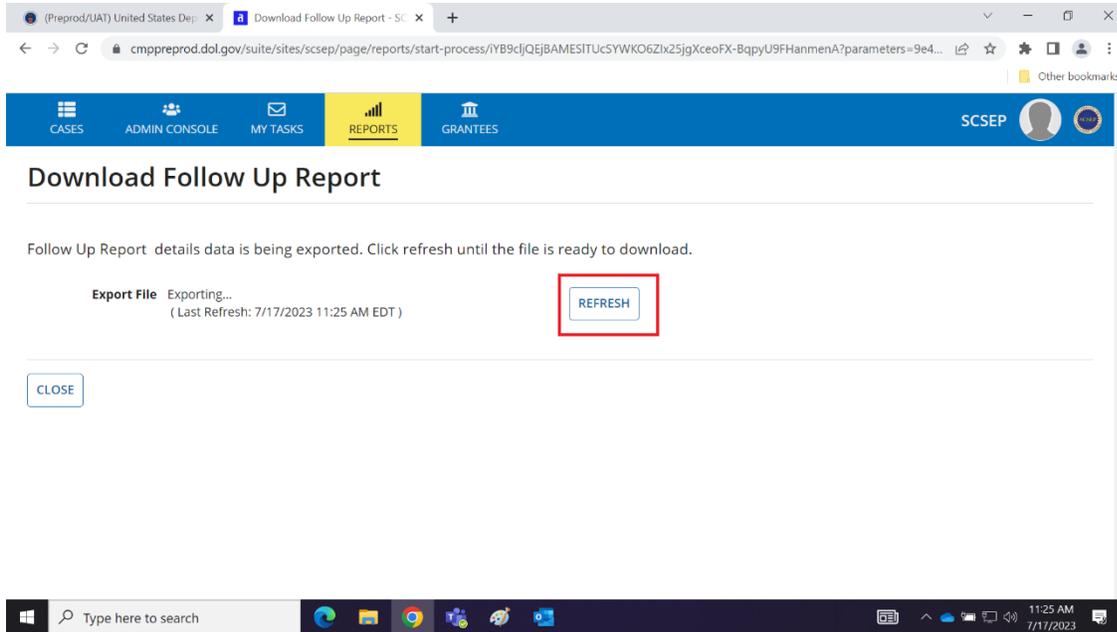
The Summary and Follow Up Report results can be exported by clicking EXPORT.

EXPORT

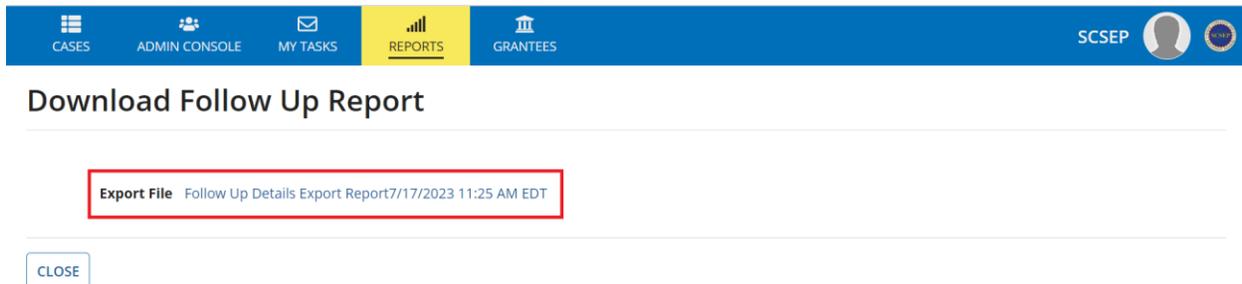
Summary

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

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



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



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

	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

	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: mm/dd/yyyy   
 Assignment Active Through: mm/dd/yyyy   
 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: mm/dd/yyyy   
 Assignment Active Through: mm/dd/yyyy   
 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**

<b>Number of Host Agencies</b>	213	<b>Number of Active Host Agencies</b>	28
<b>Average Number of Participants</b>	3	<b>Average Length of Assignment</b>	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** ▼

<b>Number of Host Agencies</b>	<b>Number of Active Host Agencies</b>
213	28
<b>Average Number of Participants</b>	<b>Average Length of Assignment</b>
3	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.

Average Length of Assignment

	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													

ReportSummary | OrgSummary | participantSummary

Bernalillo County

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

ReportSummary | **OrgSummary** | participantSummary

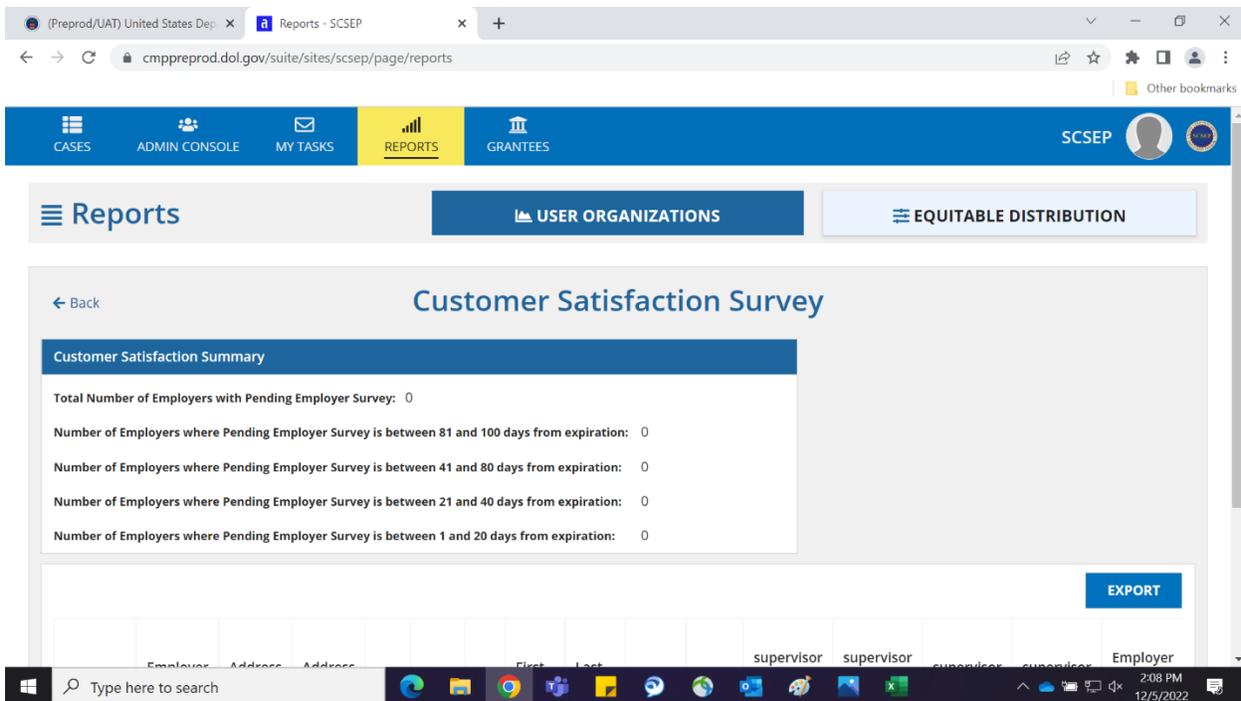
Grantee Code	Subgrantee Code	Host Agency	ID	FEIN	Address	Type
690	NM001	Coding Is Us		10274222 123456789	Santa Fe Mall , New Mexico, Santa Fe, 08854	Not For Profit
690	NM001	Lower Valley Senior Center		10059111	17 Road 6668, New Mexico, Fruitland, 87416	Government
690	NM001	Central New Mexico Commu		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,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	Not For Profit
690	NM001	SQL Servers Are Us		10273820 123456789	Olde Towne Square, New Mexico, Santa Fe,	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

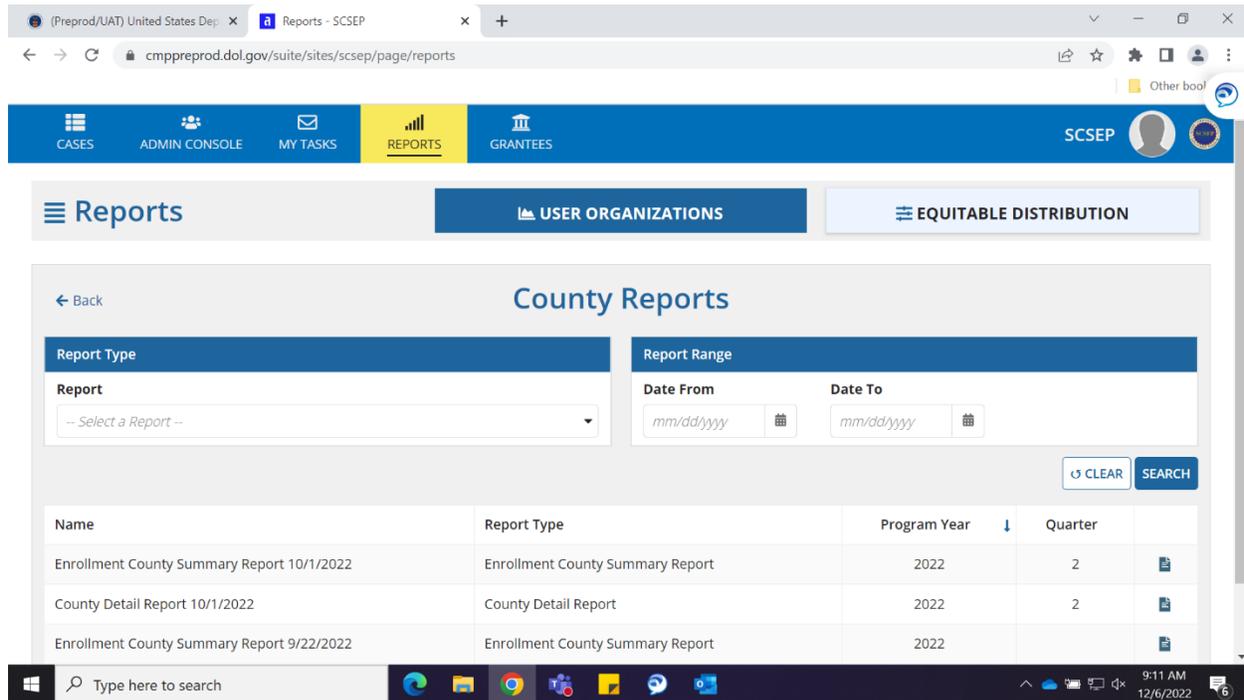


The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports`. The page has a blue navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (selected), and GRANTEES. The main content area is titled "Reports" and includes buttons for "USER ORGANIZATIONS" and "EQUITABLE DISTRIBUTION". The "Customer Satisfaction Survey" section displays a summary with the following data:

- 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

An "EXPORT" button is visible at the bottom right of the summary section. The bottom of the screen shows a Windows taskbar with the time 2:08 PM on 12/5/2022.

## 3.2 County Reports



The screenshot shows a web browser window with the URL `cmppreprod.dol.gov/suite/sites/scsep/page/reports`. The page has a blue navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (active), and GRANTEES. Below the navigation bar, there are buttons for 'USER ORGANIZATIONS' and 'EQUITABLE DISTRIBUTION'. The main content area is titled 'County Reports' and includes a 'Back' link, a 'Report Type' dropdown menu, and a 'Report Range' section with 'Date From' and 'Date To' date pickers. A 'CLEAR' button and a 'SEARCH' button are also present. Below the filters is a table with the following data:

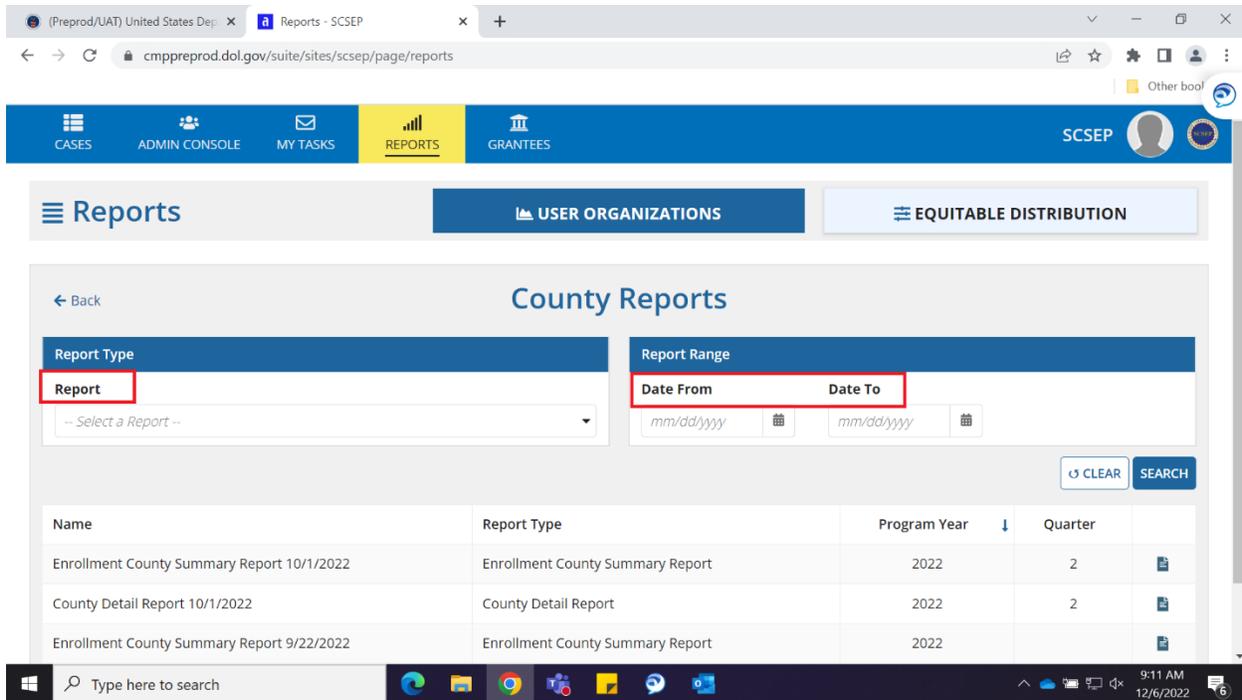
Name	Report Type	Program Year	Quarter
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2
County Detail Report 10/1/2022	County Detail Report	2022	2
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022	

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

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

**Reports** USER ORGANIZATIONS EQUITABLE DISTRIBUTION

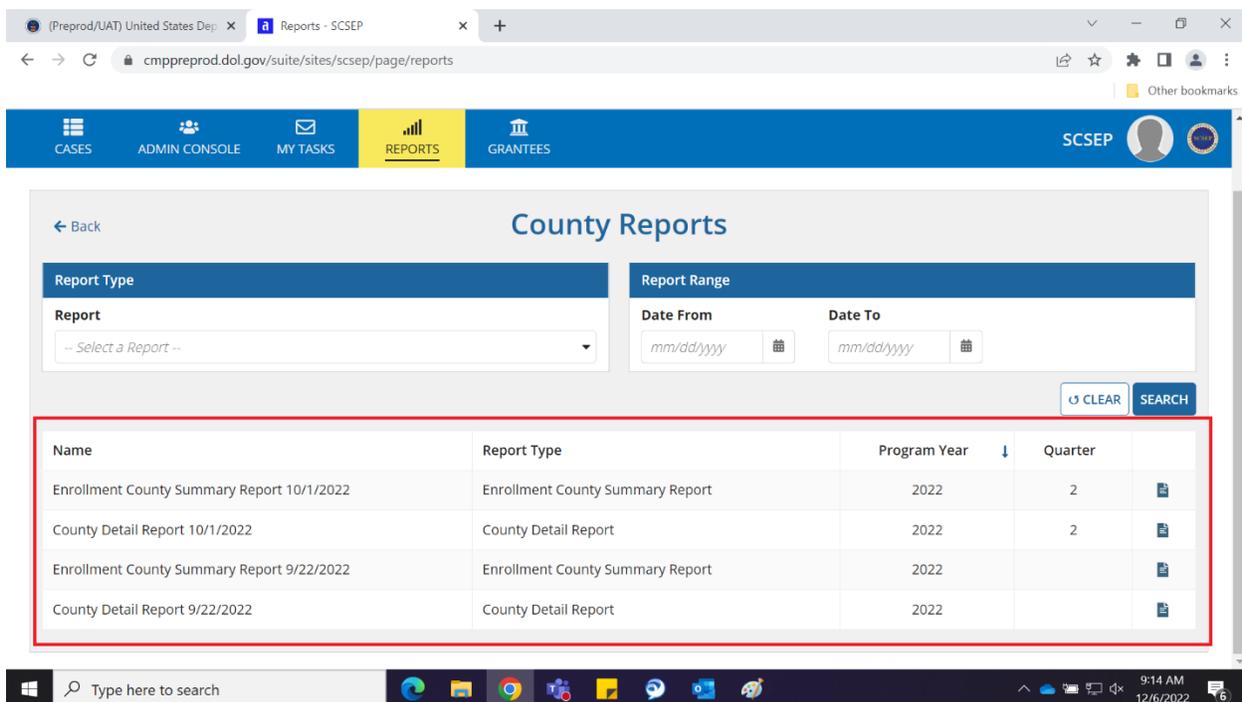
County Reports

Report Type: 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 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

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

**County Reports**

Report Type: Report  
 Report Range: Date From, Date To

CLEAR SEARCH

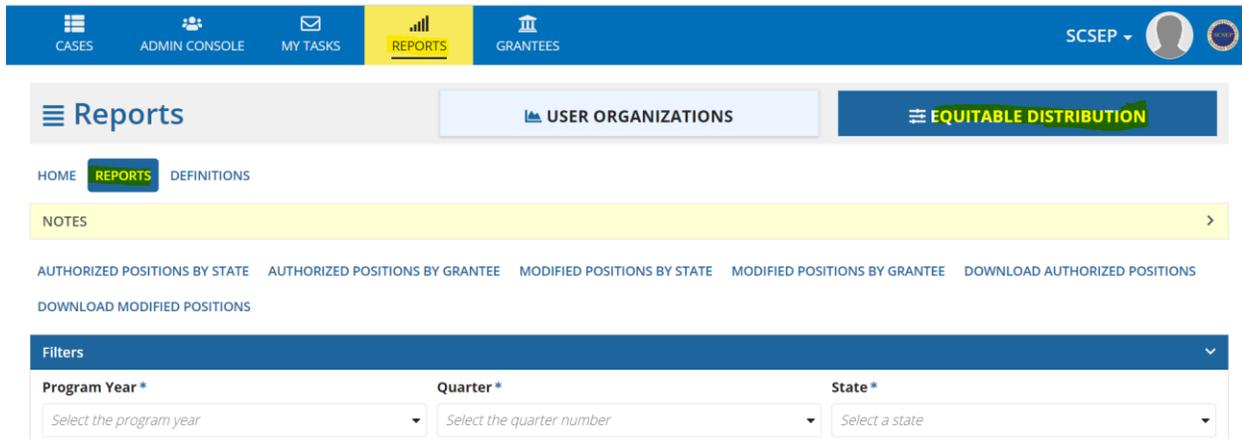
Name	Report Type	Program Year	Quarter
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2
County Detail Report 10/1/2022	County Detail Report	2022	2
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022	
County Detail Report 9/22/2022	County Detail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

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



## 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. At the top, there is a navigation bar with tabs for CASES, ADMIN CONSOLE, MY TASKS, REPORTS (highlighted), and GRANTEES. On the right, it says SCSEP and shows a user profile icon. Below the navigation bar, there is a 'Reports' section with a sub-menu for 'EQUITABLE DISTRIBUTION' (highlighted). Underneath, there are links for 'HOME', 'REPORTS', and 'DEFINITIONS'. A 'NOTES' section is visible. Below that, there are several links: 'AUTHORIZED POSITIONS BY STATE', 'AUTHORIZED POSITIONS BY GRANTEE', 'MODIFIED POSITIONS BY STATE', 'MODIFIED POSITIONS BY GRANTEE', 'DOWNLOAD AUTHORIZED POSITIONS', and 'DOWNLOAD MODIFIED POSITIONS'. At the bottom, there is a 'Filters' section 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').

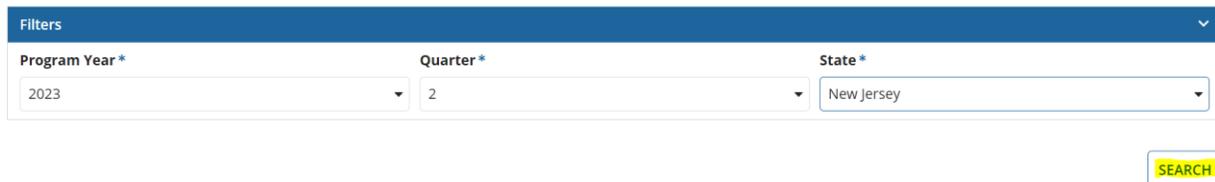
The report can be accessed via the navigational path: REPORTS > EQUITABLE DISTRIBUTION > REPORTS

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\*' with the value '2023', 'Quarter\*' with the value '2', and 'State\*' with the value 'New Jersey'. Below these filters is a yellow 'SEARCH' button.

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** ▼

<b>Program Year *</b>	<b>Quarter *</b>	<b>Grantee *</b>
2023 <span>▼</span>	2 <span>▼</span>	Associates for Training & Development <span>▼</span>

[SEARCH](#)

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**

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

**Filters** ▼

<b>Program Year *</b>	<b>Quarter *</b>	<b>State *</b>
2023 <span>▼</span>	2 <span>▼</span>	New Jersey <span>▼</span>

[SEARCH](#)

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

<b>Program Year*</b>	<b>Quarter*</b>	<b>Grantee*</b>
2023	2	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

<b>Program Year*</b>	<b>Quarter*</b>
2023	2



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

**DOWNLOAD MODIFIED POSITIONS**

**Filters**

Program Year\*  Quarter\*

 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.



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.

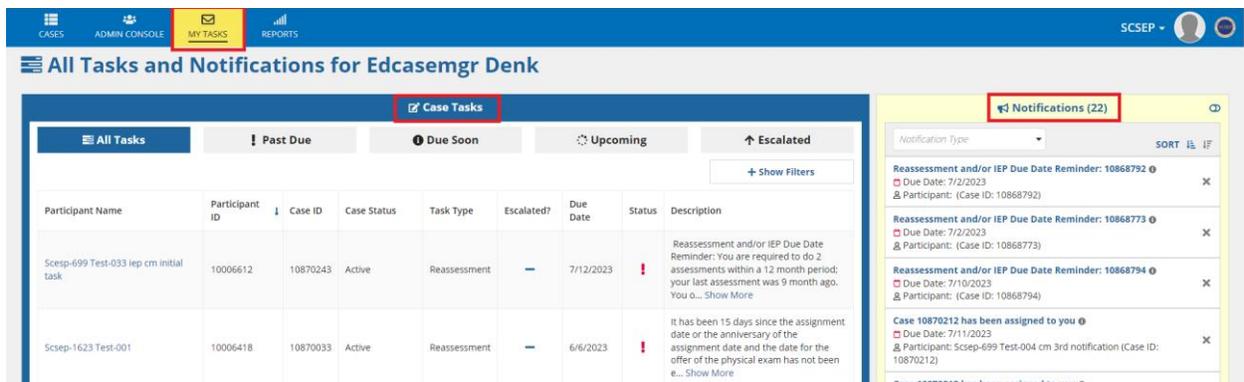
Participant Name

Search by Participant Name

Participant Cases

There are two sections under *MY TASKS*:

- Case Tasks
- Notifications



All Tasks and Notifications for Edcasemgr Denk

**Case Tasks**

Participant Name	Participant ID	Case ID	Case Status	Task Type	Escalated?	Due Date	Status	Description
Scesep-699 Test-033 lep 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
Scesep-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)**

- 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: Scesep-699 Test-004 cm 3rd notification (Case ID: 10870212)
- Case 10870213 has been assigned to you

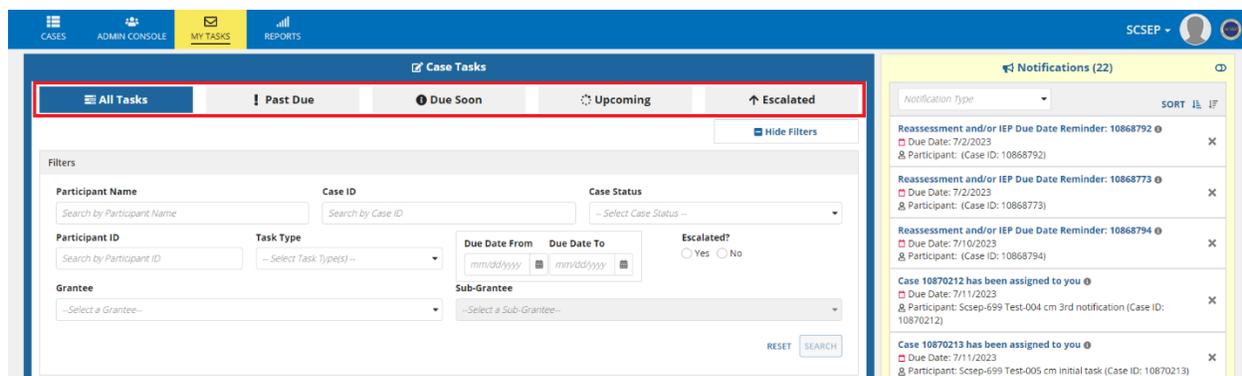
## 1. Tasks

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:

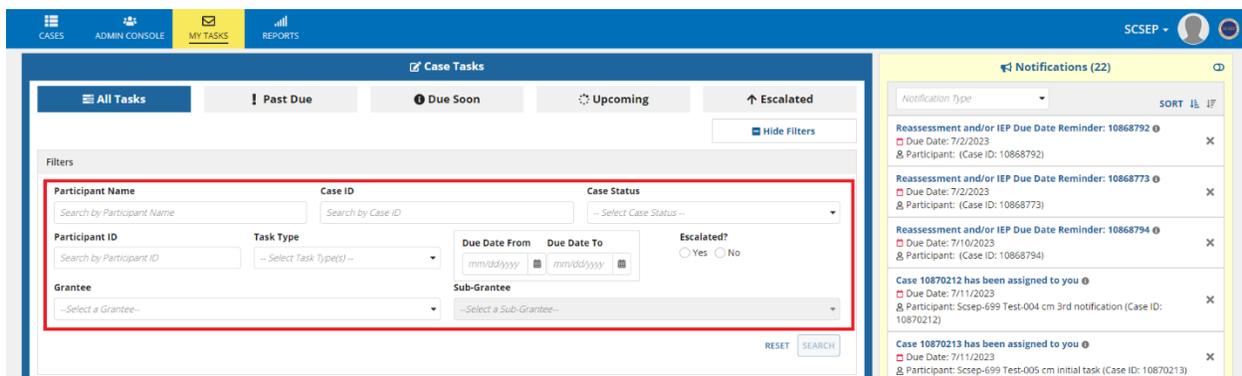
- **All Tasks** – All tasks assigned to the user appear.
- **Past Due** – Tasks that are past their assigned due date appear.
- **Due Soon** – Tasks that are two days or less from their due date appear.
- **Upcoming** – Tasks that are seven days or less from their due date appear.
- **Escalated** – Tasks 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 shows the 'Case Tasks' interface. At the top, there are navigation tabs: 'All Tasks', 'Past Due', 'Due Soon', 'Upcoming', and 'Escalated'. Below these are filter fields for 'Participant Name', 'Case ID', 'Case Status', 'Participant ID', 'Task Type', 'Due Date From', 'Due Date To', 'Escalated?', 'Grantee', and 'Sub-Grantee'. A red box highlights the filter section. To the right, there is a 'Notifications (22)' panel showing a list of notifications with details like 'Reassessment and/or IEP Due Date Reminder' and 'Case 10870212 has been assigned to you'.

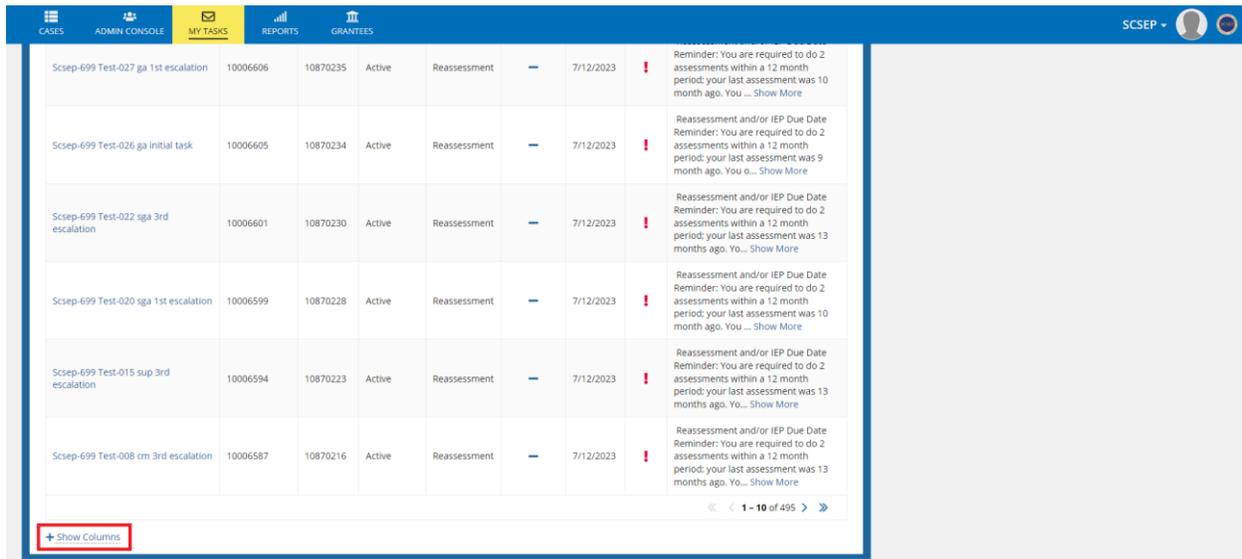
Tasks are displayed in a table format with the following default columns:

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

- **Status** – A red information icon (!) appears in the column when the task is past due. The status of the task appears when the user hovers over the icon.
- **Description** – The description of the task and the action needed appear.

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

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



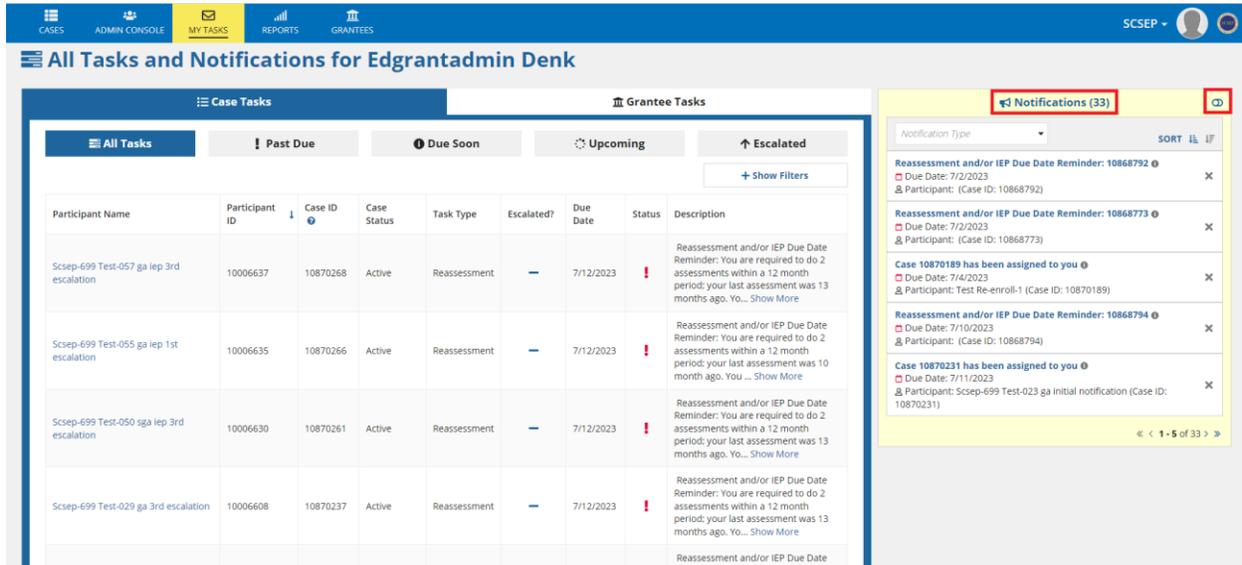
The screenshot shows a web application interface with a navigation bar at the top containing 'CASES', 'ADMIN CONSOLE', 'MY TASKS', 'REPORTS', and 'GRANTEES'. The 'MY TASKS' tab is active. The main content area displays a table with the following data:

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

At the bottom left of the table, there is a button labeled '+ Show Columns'. At the bottom right of the table, there is a pagination control showing '<< < 1 - 10 of 495 > >>'.

## 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.



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



- [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)

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 Profile

### All Tasks and Notifications for Edgrantadmin Denk

Notifications (33) Show Filters

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

### All Tasks and Notifications for Edgrantadmin Denk

Notifications (33) + Show Filters

	SORT	IF
<b>Reassessment and/or IEP Due Date Reminder: 10868792</b> Due Date: 7/2/2023 Participant: (Case ID: 10868792)		X
<b>Reassessment and/or IEP Due Date Reminder: 10868773</b> Due Date: 7/2/2023 Participant: (Case ID: 10868773)		X
<b>Case 10870189 has been assigned to you</b> Due Date: 7/4/2023 Participant: Test Re-enroll-1 (Case ID: 10870189)		X
<b>Reassessment and/or IEP Due Date Reminder: 10868794</b> Due Date: 7/10/2023 Participant: (Case ID: 10868794)		X
<b>Case 10870231 has been assigned to you</b> Due Date: 7/11/2023 Participant: Scep-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**

**Due Date From**  
**Due Date To**

**Escalated?**  
 Yes  No

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])**

**Filters**

**Notification Type**

**Due Date From**  
**Due Date To**

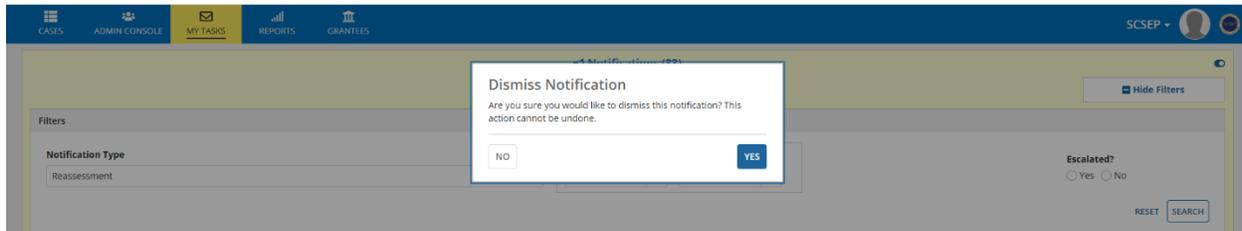
**Escalated?**  
 Yes  No

	SORT	IF
<b>Reassessment and/or IEP Due Date Reminder: 10868792</b> Due Date: 7/2/2023 Participant: (Case ID: 10868792)		X
<b>Reassessment and/or IEP Due Date Reminder: 10868773</b> Due Date: 7/2/2023 Participant: (Case ID: 10868773)		X
<b>Case 10870189 has been assigned to you</b> Due Date: 7/4/2023 Participant: Test Re-enroll-1 (Case ID: 10870189)		X
<b>Reassessment and/or IEP Due Date Reminder: 10868794</b> Due Date: 7/10/2023 Participant: (Case ID: 10868794)		X
<b>Case 10870231 has been assigned to you</b> Due Date: 7/11/2023 Participant: Scep-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

Search by 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

Search by Grantee Name

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

**Grantee Summary**

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

**Administrator Info**

Username	Name	Work Phone	Fax Number	Email
llynch@octpartners.com	Lela Lynch			llynch@octpartners.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.



## 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 Goodwill Industries International Grants

**Grantee Summary**

<b>Grantee Name</b> Goodwill Industries International	<b>Grantee Code</b> 147	<b>National Grantee</b> Yes
<b>Active</b> Yes	<b>Date First Active</b>	<b>Date Last Active</b>
<b>Region</b> region2		

**Grant Filters**

**Program Year**  
-- Select a Program Year --

**Grants**

Grant Number	Program Year	
AD362992160A24	2021	1

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 Goodwill Industries International Grants

**Grantee Summary**

<b>Grantee Name</b> Goodwill Industries International	<b>Grantee Code</b> 147	<b>National Grantee</b> Yes
<b>Active</b> Yes	<b>Date First Active</b>	<b>Date Last Active</b>
<b>Region</b> region2		

**Grant Filters**

**Program Year**  
-- Select a Program Year --

**Grants**

Grant Number	Program Year	
AD362992160A24	2021	1

CLOSE

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

Goodwill Industries International

Summary Sub-Grantees **Related Actions**



Manage Goodwill Industries International Grants

Grantee Summary

<b>Grantee Name</b> Goodwill Industries International	<b>Grantee Code</b> 147	<b>National Grantee</b> Yes
<b>Active</b> Yes	<b>Date First Active</b>	<b>Date Last Active</b>
<b>Region</b> region2		

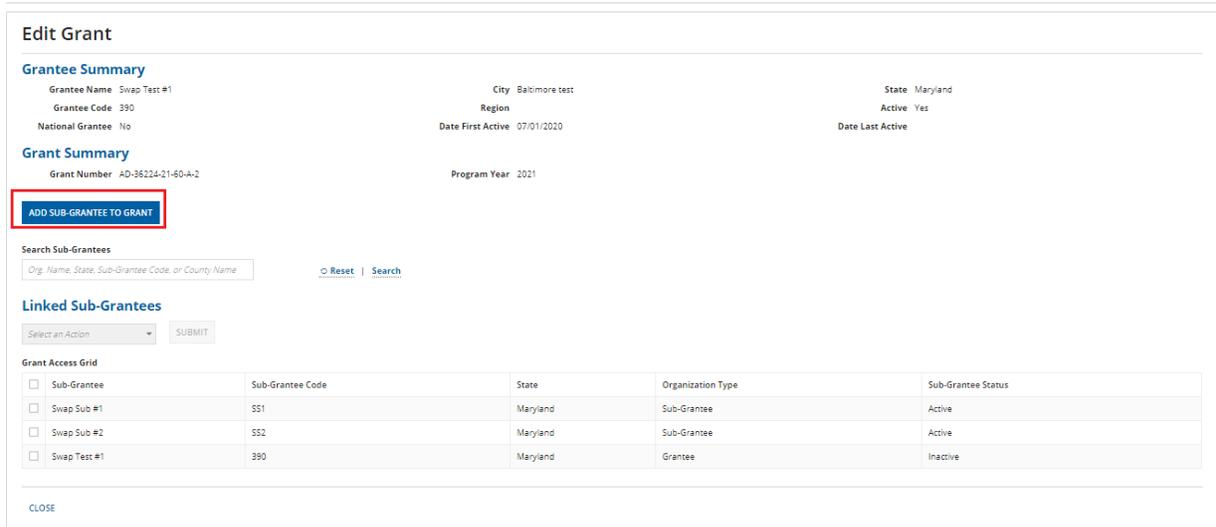
Grant Filters

**Program Year**  
— Select a Program Year —

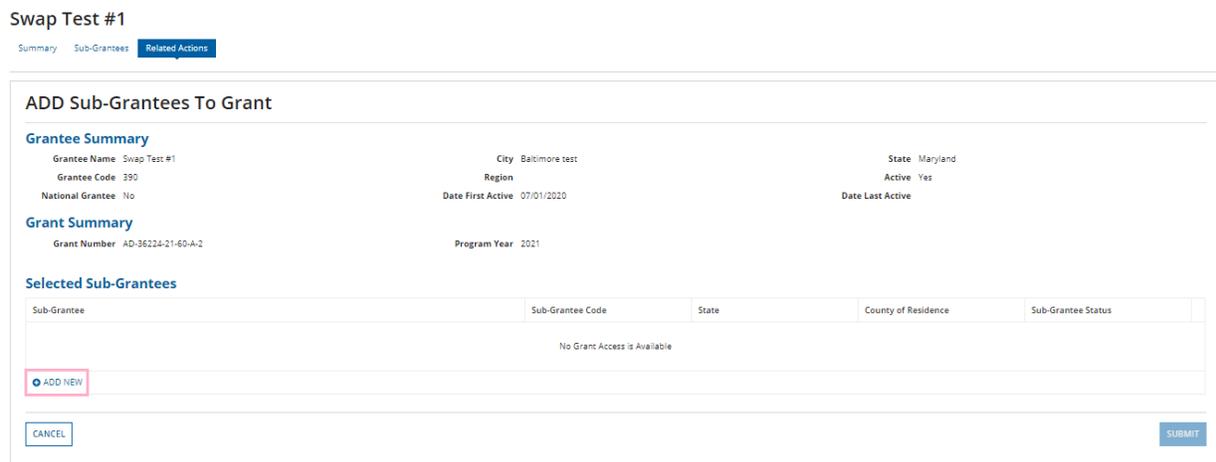
Grants

Grant Number	Program Year
AD36224-21-60-A-2	2021

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



Click **ADD NEW**.



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

### 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

### 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="d"/>				
Swap Sub #1				
Swap Sub #2				

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

**Search Sub-Grantees**

**Linked Sub-Grantees**

Select an Action

**Grant Access Grid**

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

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  
      [Reset](#)      [Search](#)

**Linked Sub-Grantees**

Remove From Grants      **SUBMIT**

Select an Action

**Remove From Grant**

<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 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**

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

**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](#)

## 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.

← Back SUB-GRANTEES

Sub-Grantee Name

Search by Sub-Grantee Name SEARCH

Hide Filters

Filters

Is Active?  Yes  No

RESET SEARCH

ID	Sub-Grantee Name	Is Active?
1869	101 N1101	Yes
1790	102 N102	Yes
1823	102 N1021	Yes
1046	103 N1103	Yes
1852	104 N1104	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 Arcebo, PR (old grant)	Yes
1277	AARP Foundation SCSEP Atlanta, GA	Yes

1 - 10 of 1,733

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

← Back SUB-GRANTEES

Search by Sub-Grantee Name SEARCH

Hide Filters

Filters

City  Search by City

Is Active?  Yes  No

RESET SEARCH

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

5 items

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	City	Baltimore test	State	Maryland
Sub-Grantee Code	DC001	Region		Active	Yes
Date First Active	04/08/2021	Date Last Active			

### Administrator Info

There is no active administrator for this organization.