OFFICE OF THE CHIEF INFORMATION OFFICER

Employment and Training Administration (ETA)

Senior Community Service Employment Program (SCSEP)

Grantee Performance Management System (GPMS)

User Guide for Grantees

Version 1.7

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Introduction

Authorized by the Older Americans Act (OAA) and originally enacted in 1965, the Senior Community Service Employment Program (SCSEP, sometimes referred to as Title V) is funded and administered by the Employment and Training Administration (ETA) of the U.S. Department of Labor (DOL). SCSEP is the oldest nationally directed community service and work-based job training program that is designed to help low-income, unemployed individuals aged 55 and older find work. The program matches 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.

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:

- Periodic assessments and an Individual Employment Plan (IEP)
- Improved living situation through paid training while preparing for future unsubsidized employment
- Connection with peers and their community and helping to address community needs
- Increase in job skills and work experience through community service assignment and by attending specialized training sessions and on-the-job experience
- Exploration of employment opportunities in their labor market
- 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. First quarter (July - September)
2. Second quarter (October - December)
3. Third quarter (January - March)
4. Fourth quarter (April - June)

Document Overview

This user guide consolidates information and instructions for using SCSEP, including role-specific information, and serves as a comprehensive reference for the management areas and 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).

This user guide is intended for use alongside other resources, including the **Data Collection Handbook**, **Data Validation Handbook**, and **QPR Handbook**. It will be updated as needed to reflect changes to GPMS.

Help Desk

If any issues are encountered with the SCSEP GPMS, contact the SCSEP Help Desk.

SCSEP GPMS Core Functional Requirements

The SCSEP GPMS is deployed on top of the Appian COTS platform that supports the case management lifecycle. 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:

Functional area	Description
User management	Using the security module, Administrators may grant and restrict user access to the features and functions of the application for individual users based upon role.
Case management	Allows users to add, update, track, and delete cases through the completion of their workflow.
Eligibility verification	Allows users to ensure that participants meet the eligibility requirements.
Services management	Allows users to add, update, delete, and track services, including program required services, supportive services, and paid training provided to participants.
Outcome management	Allows users to add, update, delete, and track participant outcomes.
Exit management	Allows users to exit participants based on pre-defined requirements.
Follow-up management	Allows users to add, edit, delete, and track follow-up services provided to program participants.
Reporting	Provides standard reports that support DOL reporting requirements for internal and external users, allowing them to create reports that are pertinent to their roles.

User Roles

Within SCSEP GPMS, the following user roles are identified:

Role name	Abilities
Case Manager	• Primary users who move the case through the Intake, Eligibility, Service, Exit, and Outcome milestones • Ability to add, edit, and read throughout the system • Ability to create new cases for their organization and to update the details of those cases assigned to them • Not permitted to submit QPRs
Case Supervisor	• Users with all Case Manager privileges plus the ability to reassign cases and Case Managers

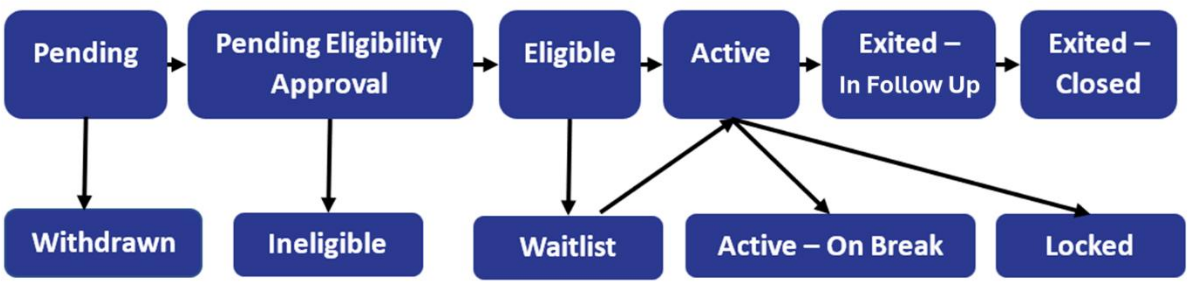
Role name	Abilities
	• Ability to create users with any role except Grantee or Sub-Grantee Administrator • Ability to assign/reassign cases to Case Managers • Ability to add, edit, delete, and read throughout the system • Ability to review and approve eligibility determination • Ability to request re-certification of a case • Not permitted to submit QPRs
Sub-Grantee Administrator	• Users with all the privileges of a Case Manager (see above) with the ability to review/edit case-related information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move cases; to approve re-certifications requested by the Case Supervisor; and to submit QPRs • Sub-Grantee Administrators inherit all permission of the Case Supervisor along with the ability to manage the set of users that have access within their sub-grant • Ability to create users with any role except another Sub-Grantee Administrator or Grantee Administrator • Ability to assign/reassign cases to Case Managers
Grantee Administrator	• Users with all the privileges of a Case Manager (see above) and above can review/edit case-related information; to add/edit/remove users and sub-recipients; to transfer, re-assign, and move cases; to approve re-certifications requested by the Case Supervisor; and to submit QPRs • Grantee Administrators inherit all permission of the Case Supervisor along with the ability to manage the set of users that have access within their grant • Ability to create users with any role except another Grantee Administrator • Ability to assign/reassign cases to Case Managers
Program Analyst	• Program Analysts are those users located within the National Program Office • Ability to add Grantee Administrators • Ability to view all grantee organizations • Ability to designate the Grantee Administrators • Ability to delete a case • Note: Only Program Analysts can view or edit PII information after it has been entered/saved in the application.
Read Only Global	• User will have View Access to all grantee/sub-grantee information in the GPMS. • If a user is provided with Read Only Global access for a grantee, the same user cannot be provided with Read Only

Role name	Abilities
	Restricted access (see below) for a specific sub-grantee with the same grantee. • User can view all cases and tasks. • Limited access to *Admin Console* and *Reports* • User can create and export reports but cannot export the extracts • User cannot create cases or edit existing cases
Read Only Restricted	• User has the same access as Read Only Global but only for their specific grantee.

For users with multiple roles in GPMS, the level of access is based on the highest level of access.

Case Status

Within the GPMS, the case statuses in the following figure are used. Each status is further defined in the table.



Status	Description
Pending	Case has not been submitted for eligibility determination. Case status is updated to *Pending* when the Case Manager has completed the case creation process, but the participant has not been moved through all the intake process steps.
Withdrawn	Case has not been submitted for eligibility determination and user has selected **Withdraw** from the *Related Actions* tab.
Pending Eligibility Approval	An eligibility determination decision has not been made. A task for eligibility approval has been created by the user (and sent to the Case Supervisor), but eligibility has not been approved.
Eligible	Case status is updated to *Eligible* when eligibility approval has been granted by the Case Supervisor.
Ineligible	Case status is updated to *Ineligible* if the Case Supervisor deems the case to be disqualified due to specific program requirements.

Status	Description
Waitlist	When the case is determined to be *Eligible*, the case is placed on a waitlist until a community service assignment is available.
Active	Case status is updated to *Active* after eligibility has been approved by the Case Supervisor, the program orientation date has been added, and an assignment has been added, meaning the case has been assigned to a host agency for a community service assignment.
Active – On Break	An active case has a break in service where the system date is between the break start date and the break end date.
Locked	A case has been locked for exceeding the durational limit.
Exited – In Follow-Up	A case has been exited for unsubsidized employment and has a placement associated with it. *Follow-Up* is only relevant for enrollments that have a placement. When case status is *Exited – In Follow-Up*, access is limited to the *Summary*, *Services*, *Outcomes*, *Follow-Ups*, and *Related Actions*.
Exited – Closed	A case has been exited for a reason other than unsubsidized employment.

Universal Features

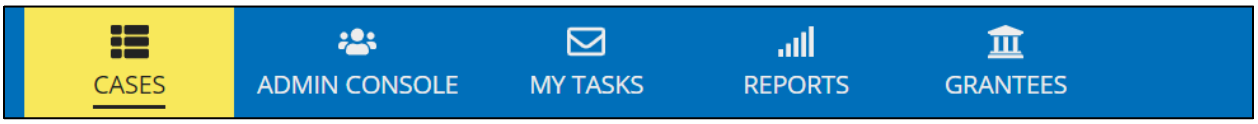
This section provides information on the basic functionalities found throughout the system.

Role name	Abilities
Tabs	A sequence of identifiers across the top of the screen that provide a menu of options.
Navigation buttons	A sequence of buttons at the bottom of the screen to navigate the user.
Dropdown lists	Provide a list of allowable values for the field, thereby limiting the selection.
Field-level help	Alert the user to the nature of the data to be entered for various fields.
Required fields	An asterisk (*) directly next to a field label is used to identify fields where mandatory information is required to proceed.
Calendar buttons	A calendar format is provided to select a date.
Upload documents	A button used to begin the attachment of an external document to the case.
Error & warning messages	Used to display required or recommended actions or errors in data.

Role name	Abilities
Alternative text and tooltips	Alt text or tooltips have been added in GPMS to aid in the translation of visible UI content into text that is either read aloud or presented as Braille.

Tabs

Once you sign in to SCSEP GPMS, the main navigation bar appears at the top of the screen, containing various tabs for navigation through the application.



Tab	Explanation
Cases	All the cases created by the user can be found here.
Admin Console	Available to Administrator roles. Refer to the 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 screen without saving the information and returns to the main overview screen.
Save + Continue	Saves the information and proceeds to the next screen.
Save + Close	Saves the information, closes the screen, and returns to the main overview screen.
Continue	Proceeds to the next screen.
Previous	Returns to the previous screen without saving the information.
Complete	Saves the information and completes the case intake process.

Dropdown Lists

Dropdown lists provide a predetermined list of allowable values to ensure that only those values are selected and entered into the GPMS. Depending on the specific dropdown list, only one value may be selected, or multiple values may be selected.

Field-Level Help

Fields marked with a question mark icon (?) offer field-level help. Hovering over the question mark displays help text with specific instructions or data validation limits for that field.

Required Fields

Fields marked with an asterisk (*) are mandatory and require user input before moving forward or saving the data entered on the screen. Data will not be saved until all required fields are populated with valid data. If you attempt to save the data by selecting **Save + Continue** with no data entered in the required fields, a message will be displayed, and you will not be able to move forward until required fields are populated with valid and appropriately formatted data.

Calendar Buttons

To enter a date into the GPMS, you can 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. Use the arrows to navigate to the correct date before pressing the **Enter** key.

Upload Documents

Use the **Upload** button to add documents to a case. After clicking **Upload**, choose one or more files from your local hard drive using the file browser, and then click **Open** to execute the upload. Repeat this process for any additional files.

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

Grids

Grids display rows of data in a tabular format and allow you to select a specific item for further viewing or action. In some instances, checkboxes are displayed that allow you to select a specific row from a grid with which to work. At other times, you 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 or down) within the header row indicating that data within the grid can be sorted in either ascending or descending order. Click the arrow next to the title in the grid's header row to sort the data. To sort in the reverse order, click the arrow next to the title in the grid header again.

When a grid has many rows, the number of rows is displayed in the bottom-right corner of the screen. 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

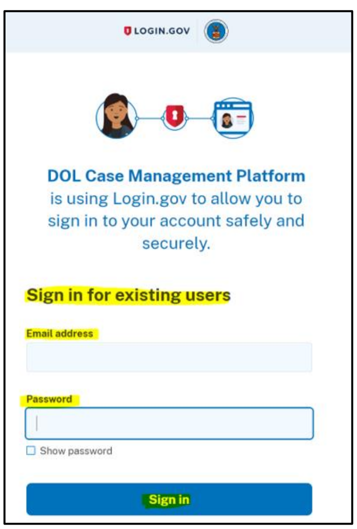
Error messages will be displayed if you are required to take corrective action on a screen before moving forward. Data validation messages are displayed for user information and do not require corrective action before moving forward and appear on the data entry screen while the data is entered.

Start Up

Setup for New Account

Please refer to the instructions in the **GPMS Production Access** document under **Quick Links** on the SCSEP Help website. To access SCSEP GPMS:

1. Launch https://cmp.dol.gov/suite?signin=login-gov
2. Enter your credentials.



3. Click **Sign in**.
4. Enter the code received from login.gov.
5. Click **Submit**.
6. Select **SCSEP** from the dropdown list on the Department of Labor homepage.

Navigating SCSEP

When a user accesses the GPMS application, a menu consisting of four tabs (five 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, but 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.)

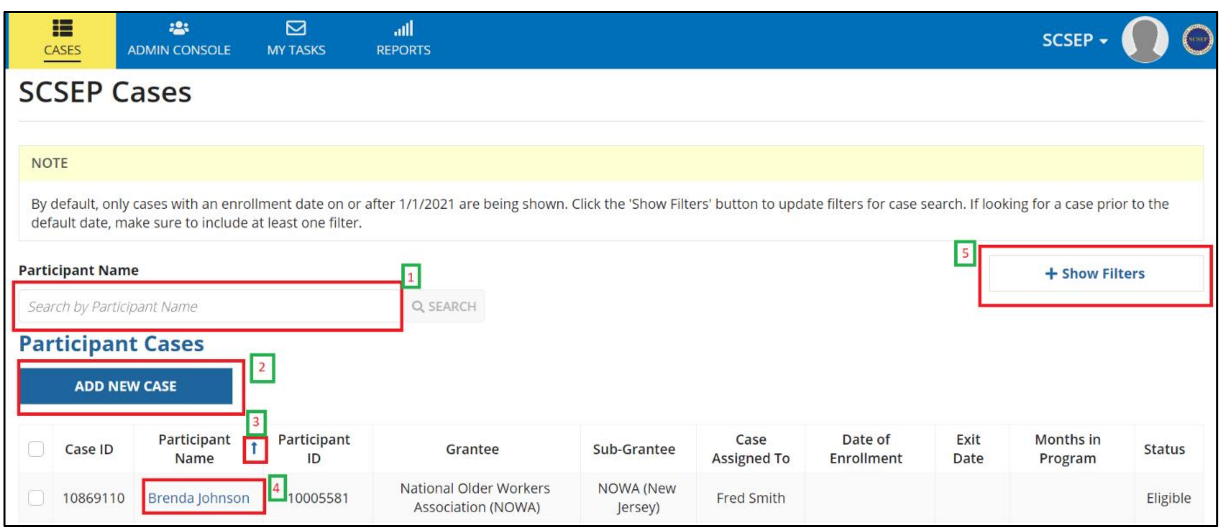
The *Cases* tab displays a grid of SCSEP participant cases currently or previously enrolled within the user's grantee(s) and sub-grantee(s).

Below the *SCSEP Cases* heading, the following text is displayed in a note box:

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

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

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

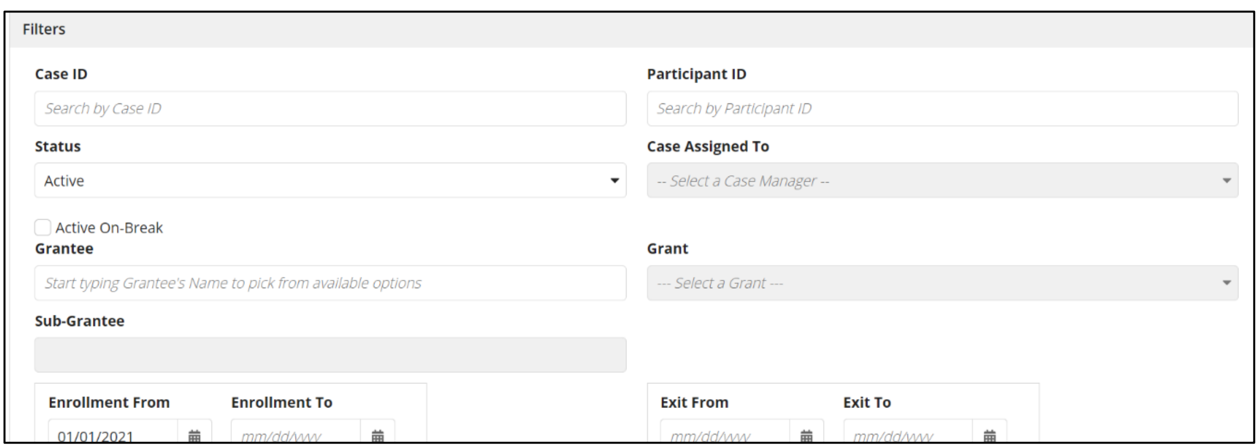


Each of the functionalities available under the *Cases* tab will be discussed in the sections related to the case entry and development/handling process.

1. **Search**: The **Participant Name** search allows you to search all participants based on any part of the participant's name. Any of the following formats can be used:

a. [last name], [first name]
b. [first name] [last name]
c. [last name]
d. [first name]

2. **Add New Case**: Click **Add New Case** to begin the process of entering a new case for a new or existing participant into the system.
3. **Sorting arrows**: Use the sorting arrows (ascending and descending) to sort participant cases in the desired order.
4. **Participant Name**: Click on a participant's name to open the record for display and editing.
5. **Filters**: The **Show Filters** button allows you to specify a range of possible items with which to limit the displayed cases within the grid (the default is to display all):
    a. **Case ID**
    b. **Participant ID**
    c. **Status**: You can select one or many statuses.
    d. **Case Manager**: You can select cases assigned to a particular Case Manager. This field can only be selected once a sub-grantee is selected.
    e. **Grantee**
    f. **Sub-Grantee**: You can only select a sub-grantee after selecting the grantee.
    g. **Grant (Informational)**: When you select a sub-grantee, the filter displays a grant number associated with the grantee/sub-grantee.
    h. **Enrollment Date From**: You can select cases where the enrollment date is on or after the entered date.
    i. **Enrollment Date To**: You can select cases where the enrollment date is on or before the entered date.
    j. **Exit Date From**: You can select cases where the exit date is on or after the entered date.
    k. **Exit Date To**: You 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 user guide. Refer to the **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. You 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**" appears below the field. When clicked, a textbox displays additional information regarding the field. The text will also change to "**Hide Instructions**," which will close the textbox when clicked.

Clicking **Complete** in this and other sections of case data entry will display the text "Action Completed" temporarily 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 **Add New Case**. The *Create New Case* screen will appear.

2. Enter the applicant's **Social Security Number** (SSN), and then re-enter it in the **Confirm Social Security Number** field.
    a. The applicant's SSN is masked as a series of asterisks *********.

b. The system validates that the SSN is in a valid format and that the applicant does not already exist in the system based on their SSN.
c. 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. Press the **Enter** key or click anywhere on the screen to view the **Reset** and **Search** links.

a. Click **Reset** to clear the SSN from both fields and begin a new SSN search.
b. Click **Search** to search for a participant with that SSN.

When **Search** is clicked:

i. If the applicant's SSN is already in the system, and has an active case, their details are shown along with the following message: "Note: The participant with the Social Security Number that is entered already exists within SCSEP. Based on the Social Security Number, this person is currently enrolled with the following Grantee: <Grantee Name>. Please contact your Grantee." The **Continue** button is grayed out.

ii. If the participant's SSN is already in the system **AND** has an exited case, the participant's details are shown along with the following message: "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." If the user wishes to add a new case in the system, click **Continue**.

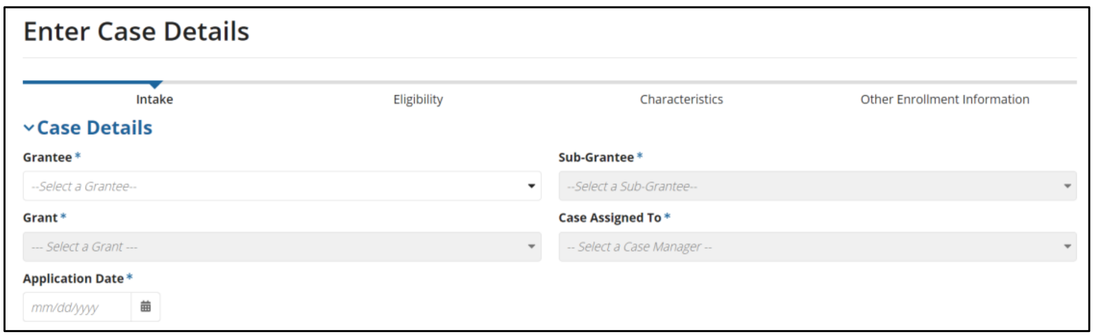
If the existing participant has an open placement, the following message is displayed on the *Enter Case Details* screen: "The participant currently has an Open Placement with [Grantee Name] CaseId:[CaseId] and cannot be re-enrolled until the Placement End Date for that previous enrollment has been completed. A Task notification has been sent to the grantee."

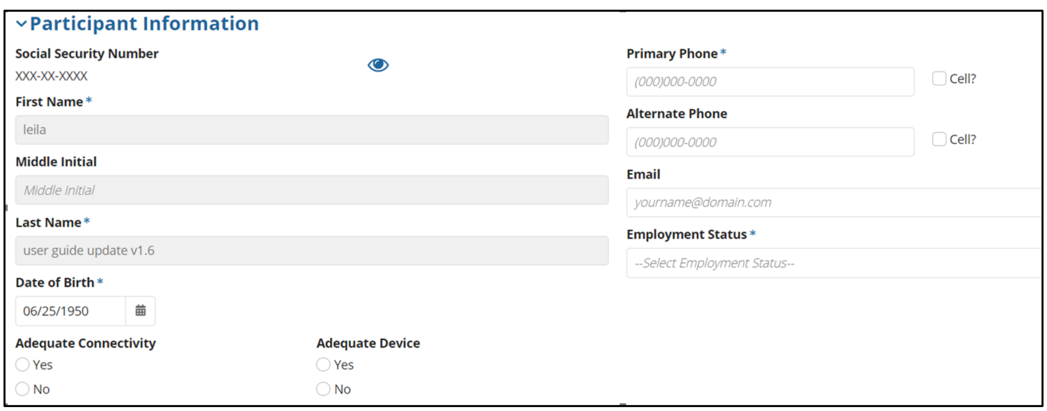
iii. If the applicant's SSN is not in the system, the *Enter New Participant Details* section appears with the following message: "Note: The participant with the Social Security Number that is entered does not exist within SCSEP. Fill out the following form to create a new participant."

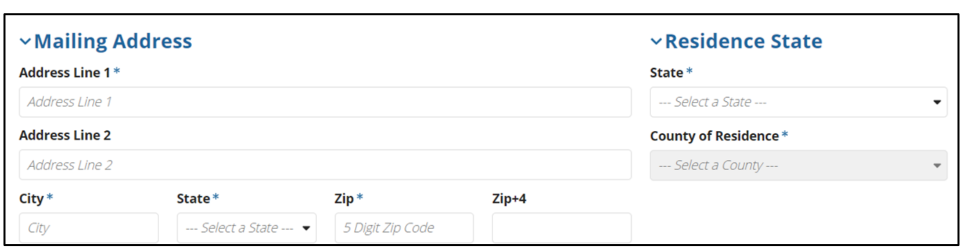
iv. If the applicant does not have an active assignment and has between 1 and 30 days left on the durational limit, the following message is displayed: "The following participant was found with that Social Security Number. Please note this participant is [exact value] days from reaching durational limit. Please continue if you wish to add a new case for this participant. Unless the participant's durational limit date is increased, the termination letter would have to be issued immediately or it may be overdue.”

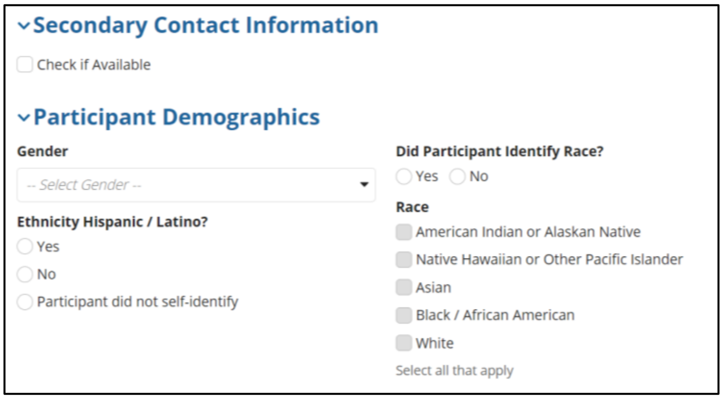
4. Enter the information into the fields on the screen and click **Continue**. Once the applicant’s name, Social Security Number, and date of birth are entered into the system, they cannot be updated. Contact SCSEP Help for assistance with updating the information.

5. The *Enter Case Details* screen will appear.

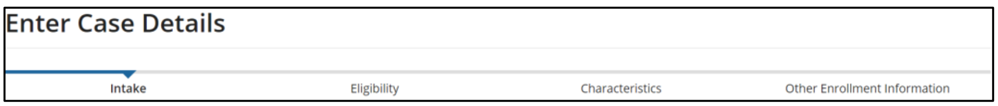




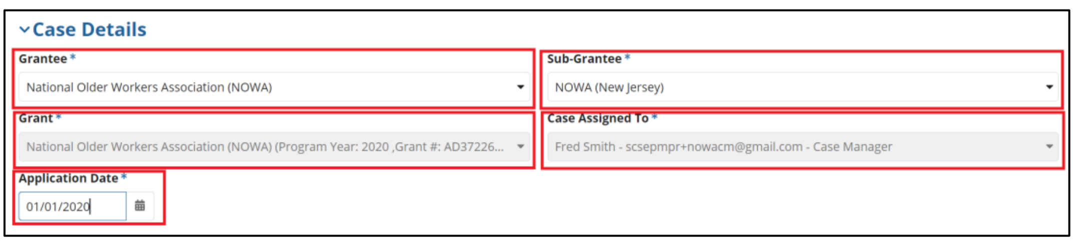




a. Use the progress bar at the top of the screen to track your progress while creating a new case. The case module navigates through four screens to create a new case: *Intake*, *Eligibility*, *Characteristics*, and *Other Enrollment Information*.

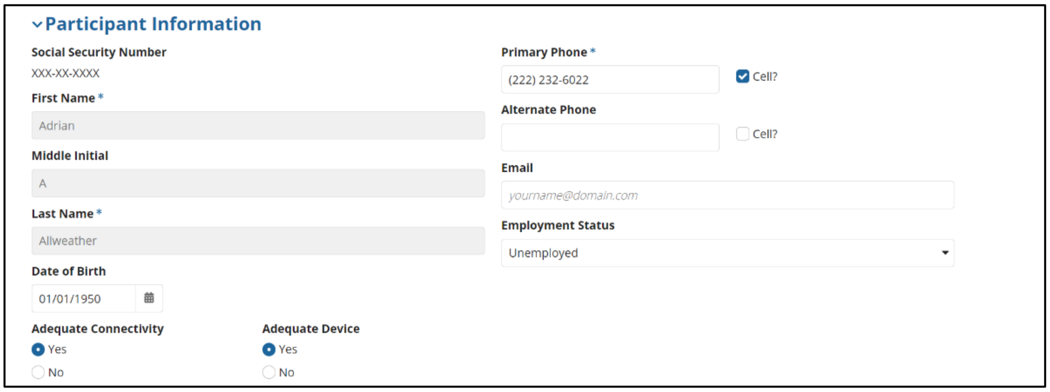


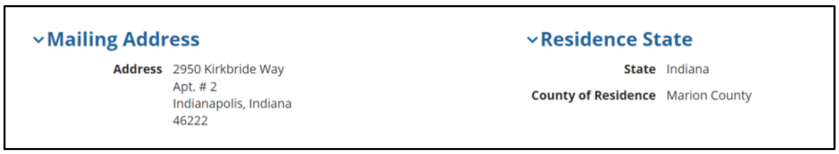
b. Select the **Grantee**, **Sub-Grantee**, and **Grant** in which to enroll the applicant. If the user has a single role associated with their account, the respective dropdowns default to that grantee and sub-grantee.



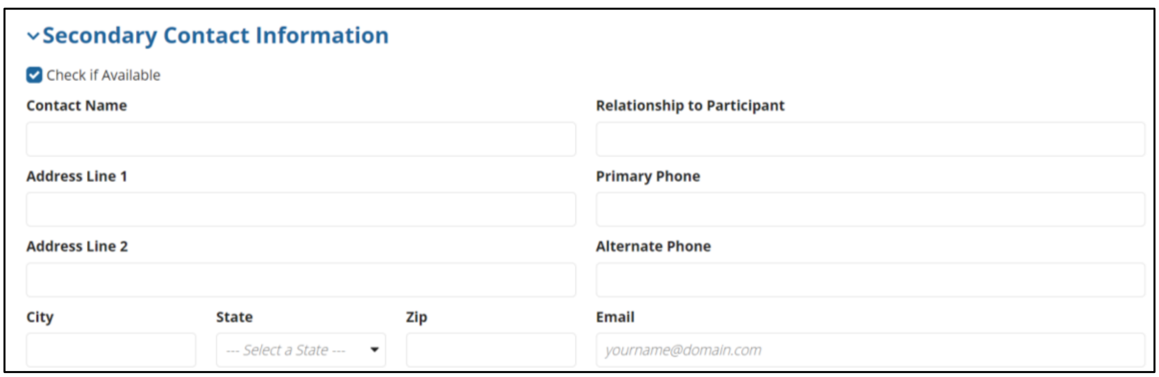
6. Select the Case Manager assigned to the case. Once a case is created, it may be reassigned only by a Supervisor or an Administrator.

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

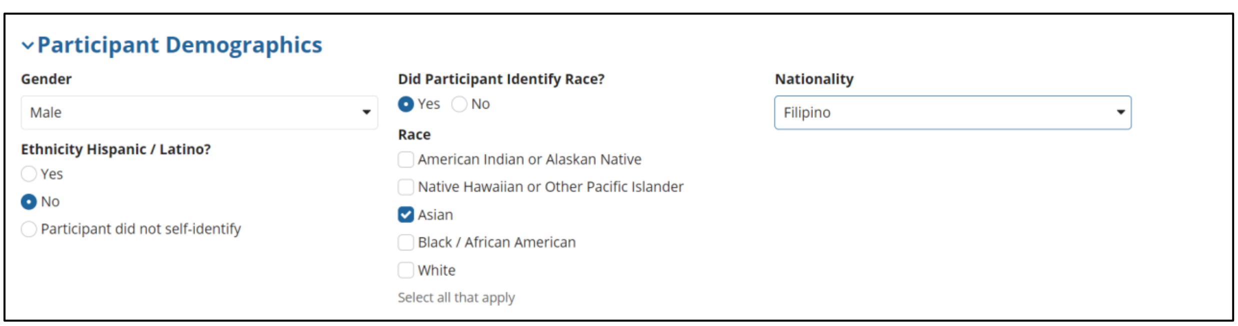




8. If the applicant has a secondary contact, select the **Check if Available** checkbox under *Secondary Contact Information*. Contact information fields will appear on the screen. Enter the information into the fields.



9. Enter the applicant's demographics. If **Native Hawaiian** or **Other Pacific Islander or Asian** is selected for **Race**, an additional field labeled **Nationality** will appear.



10. Select one of the navigation buttons at the bottom of the screen:

a. **Close** opens a pop-up window to confirm the case will close.
   i. Click **No** to return to the *Intake* screen.
   ii. 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.

b. **Save + Continue** opens a pop-up window to confirm case creation.
   i. Click **No** to return to the *Intake* screen. Information entered into the fields on the screen will not be saved.
   ii. Click **Yes** to save the information and create the case.

c. **Save + Close** saves the information entered on the screen.

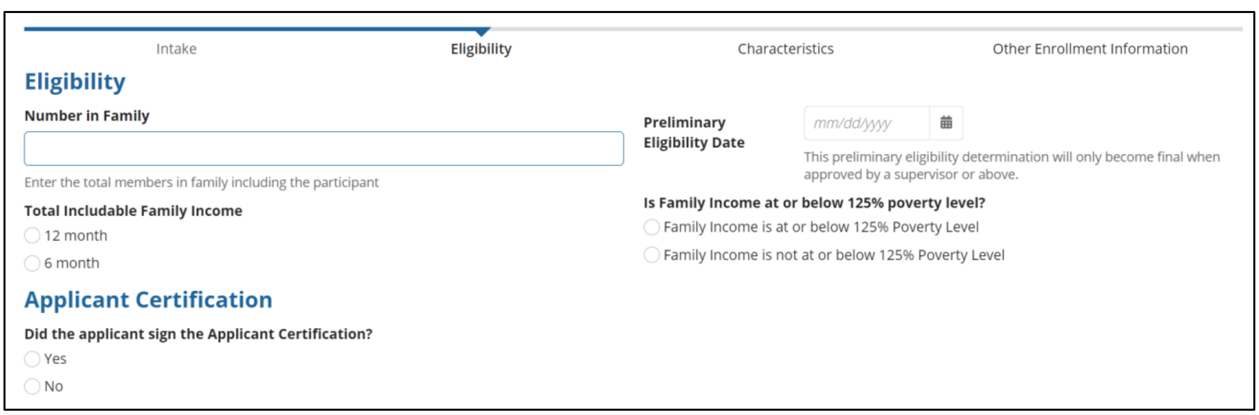
1.2 Eligibility

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 obtain 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.



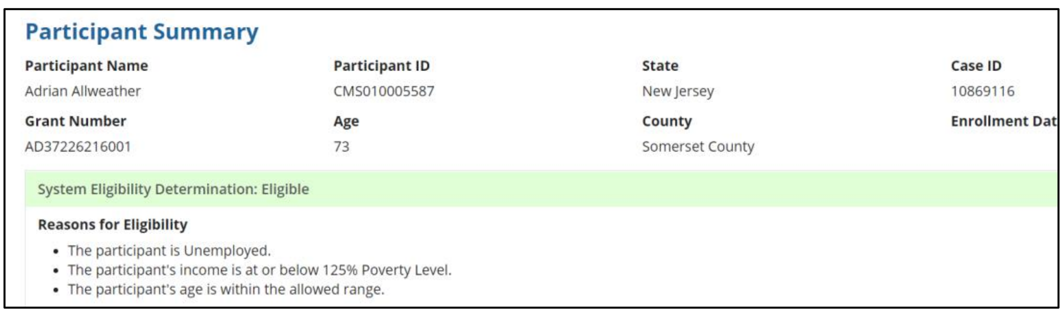
Case Manager

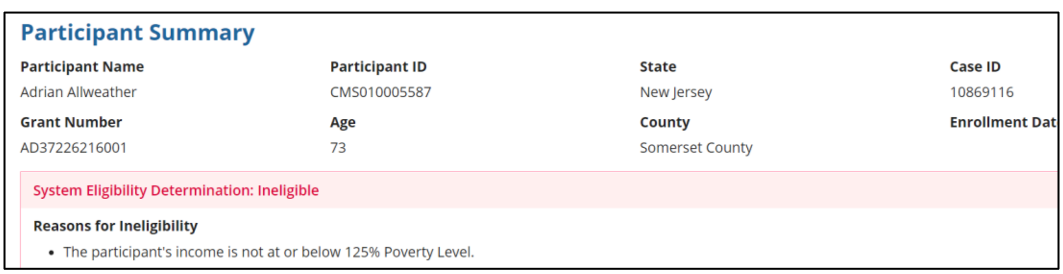
1. Enter the information into the fields on the *Eligibility* screen.
2. The instructions for the **Number in Family** field are as follows: "Enter the total members in family including the participant." If the number exceeds 14, a warning message will appear,

and the user can choose to either to confirm or reject the number.

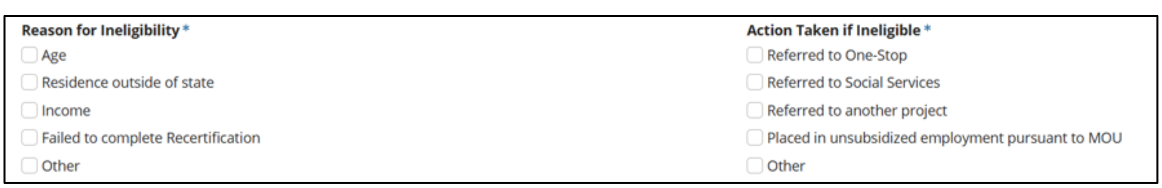
3. The instructions for the **Total Includable Family Income** field are as follows:
    a. For the 12-month period: “Total includable family income during the 12-month eligibility determination period.”
    b. For the 6-month period: “Total includable family income during the 6-month eligibility determination period, annualized.”

4. Select one of the navigation buttons at the bottom of the screen:
    a. **Previous** returns you to the previous screen in the intake process.
    b. **Close** returns you to the main *Cases* screen without saving information. A confirmation message will appear.
    c. **Save + Close** saves the information entered on the screen and returns you to the main *Cases* screen.
    d. **Save + Continue** saves information entered on the screen and navigates you to the next screen. The system will display eligibility based on the information entered.





5. 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 will appear.



6. Select one of the navigation buttons at the bottom of the screen:
    a. **Previous** returns you to the previous screen.

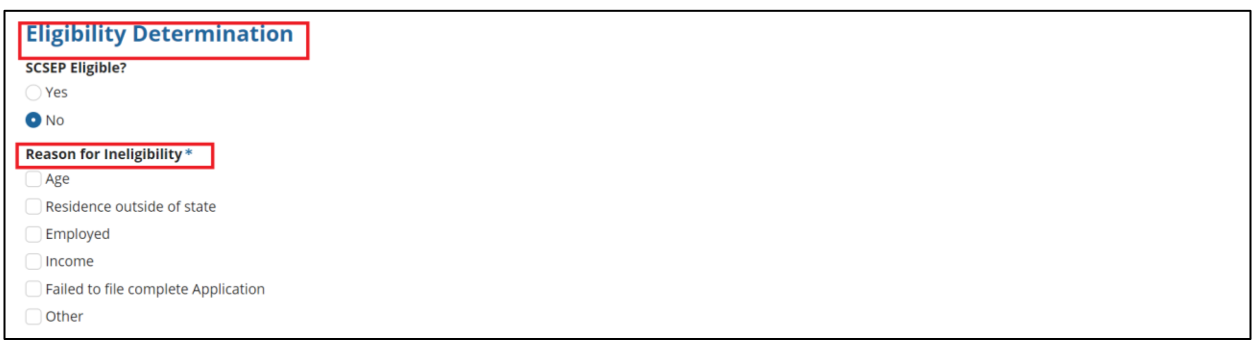
b. **Submit** opens a pop-up window to confirm eligibility submission. The message states: “Submit Confirmation: The Supervisor will now review this request and make the final Eligibility decision. Do you want to continue?”

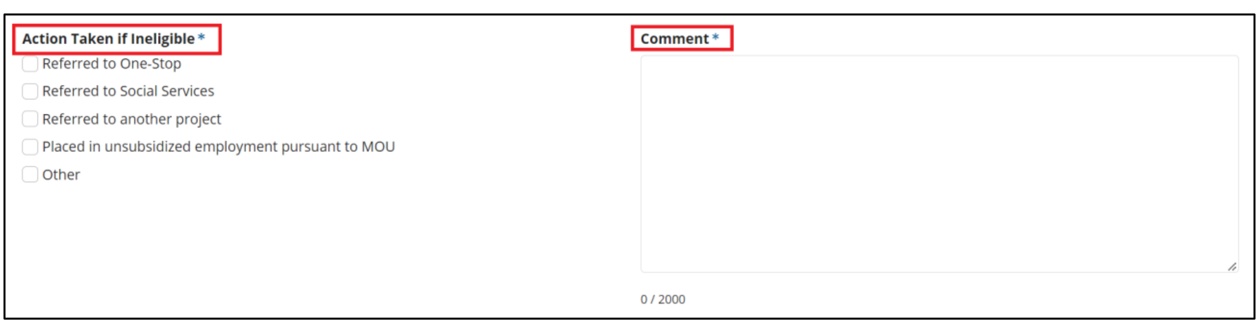
A notification is sent to the Supervisor requesting approval for eligibility determination, and the *Characteristics* screen will appear. While eligibility is pending approval, the Case Manager can continue entering information into the *Characteristics* and *Other Enrollment Information* screens.

Supervisor

If a Case Manager submits a case for eligibility approval, the Supervisor will receive a task immediately in their list.

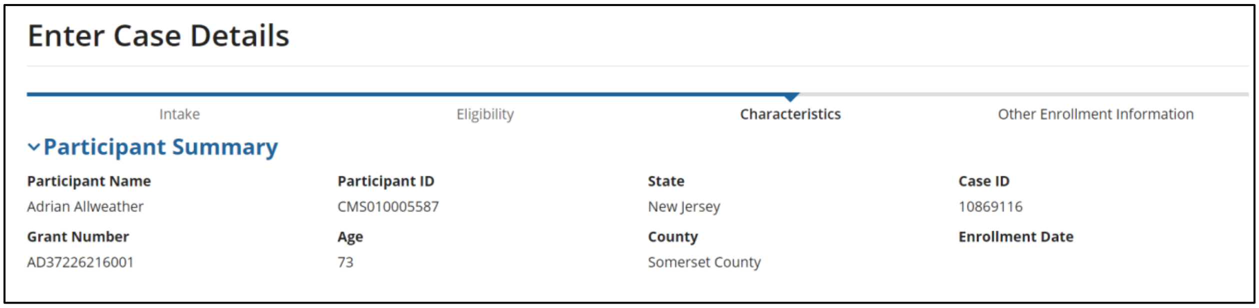
1. Select **My Tasks** from the main navigation bar to find the participant in the tasks list.
2. Click on the link in the task to approve the eligibility for the participant. The *Intake Checklist* screen will appear.
3. Click **Approve Eligibility** in the top-right corner of the screen. The *Eligibility Determination Approval* screen will appear.
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 will appear.
5. Select one of the navigation buttons at the bottom of the screen:
   a. **Cancel** returns you to the *Intake Checklist* screen.
   b. **Submit**:
      i. If the participant was deemed eligible, the button returns you to the *Intake Checklist* screen and the participant’s status appears as *Eligible*.
      ii. If the participant was deemed ineligible, the button returns you to the *Intake Checklist* screen and the participant’s status appears as *Ineligible*.

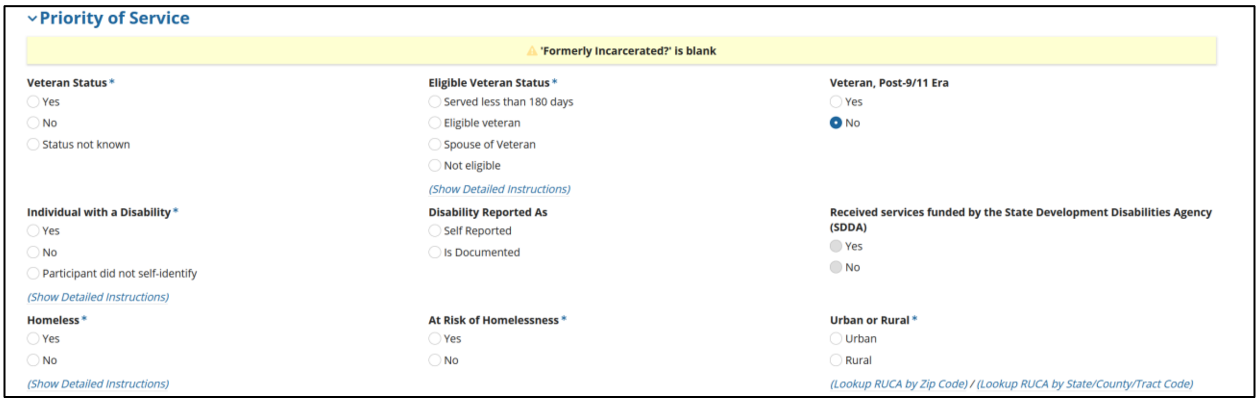


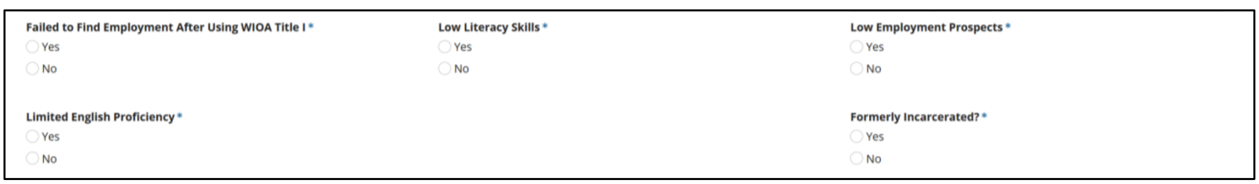


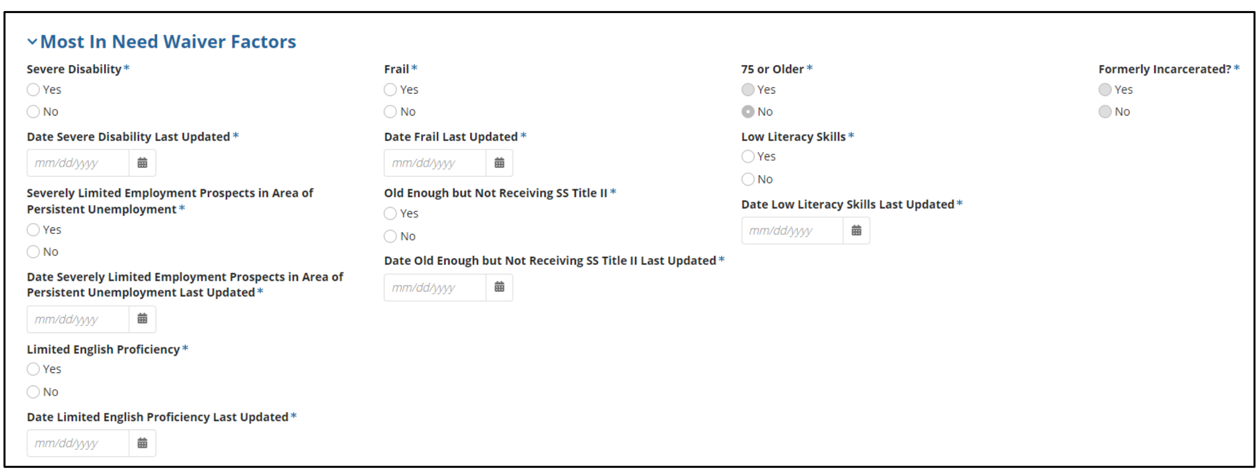
1.3 Characteristics

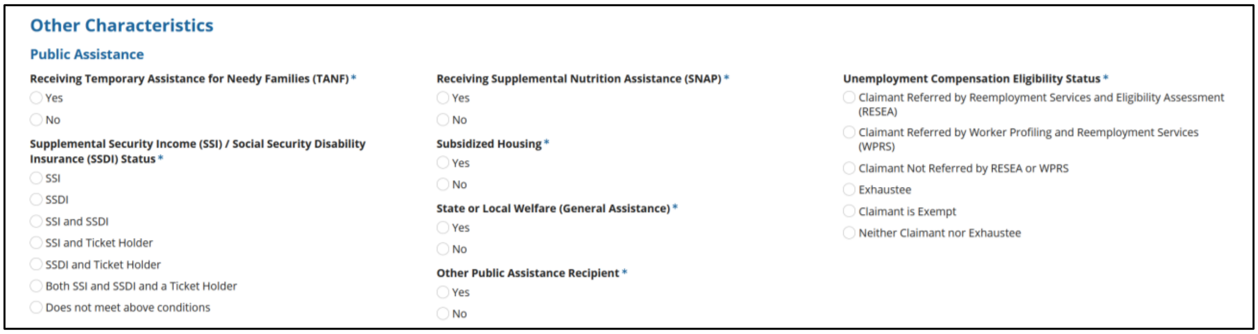
The next step in the case creation is the entry of the participant characteristics.

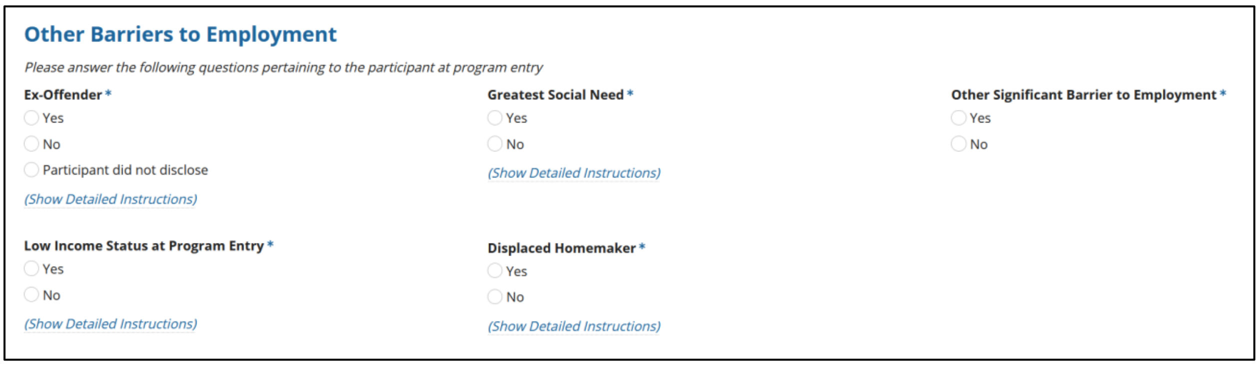


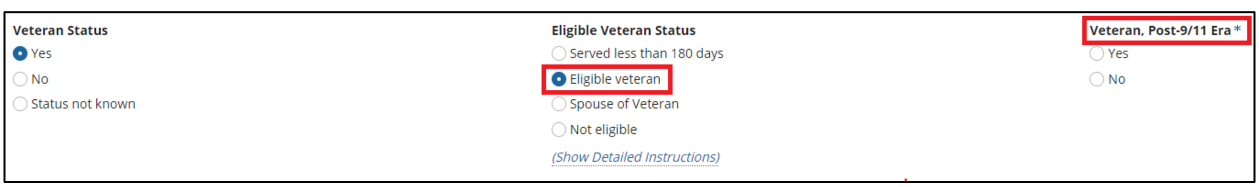




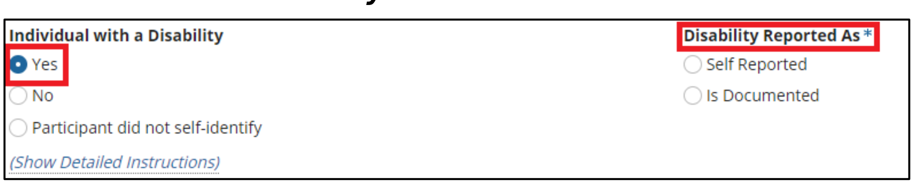








Individual with a Disability



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

Homeless

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

Limited English Proficiency

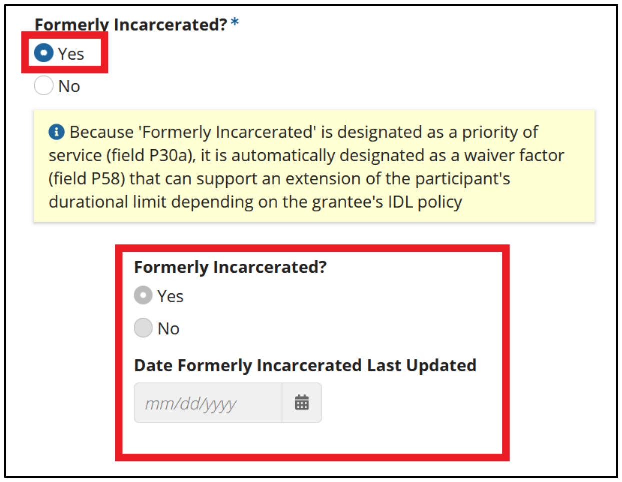
If a user selects *Yes* for **Limited English Proficiency**, the **Primary Language** field appears and is mandatory. Please note that users cannot select *Yes* for both **Limited English Proficiency** and **Low Literacy Skills** characteristics.

Formerly Incarcerated

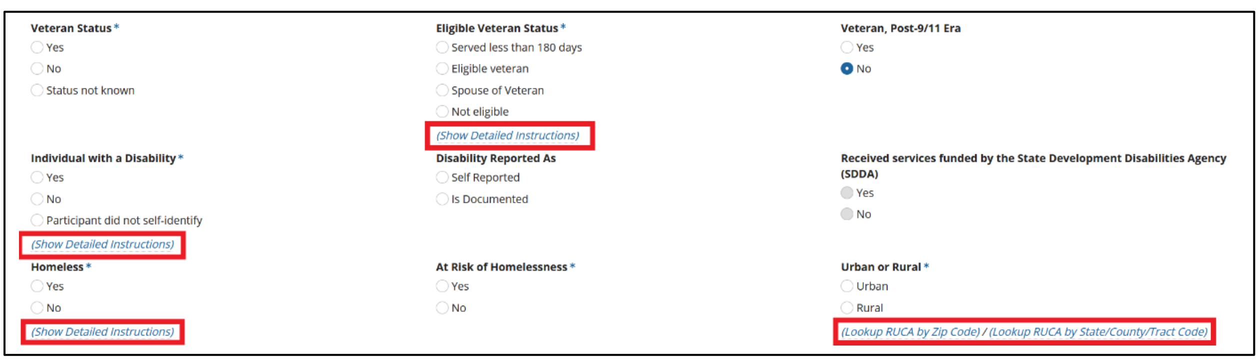
If a user selects *Yes* for **Formerly Incarcerated?** under **Priority of Service**, the following text displays below the field in a yellow text box:

> "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**.



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



Most In Need Waiver Factors

Severe Disability *
- Yes
- No

Date Severe Disability Last Updated *

mm/dd/yyyy

Severely Limited Employment Prospects *
- Yes
- No

Date Severely Limited Employment Prospects Last Updated *

mm/dd/yyyy

Limited English Proficiency *
- Yes
- No

Date Limited English Proficiency Last Updated *

mm/dd/yyyy

Frail *
- Yes
- No

Date Frail Last Updated *

mm/dd/yyyy

Old Enough but Not Receiving SS Title II *
- Yes
- No

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

mm/dd/yyyy

75 or Older *
- Yes
- No

Low Literacy Skills *
- Yes
- No

Date Low Literacy Skills Last Updated *

mm/dd/yyyy

Formerly Incarcerated?
- Yes
- No

Date Formerly Incarcerated Last Updated *

mm/dd/yyyy

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

1.4 Other Enrollment Information

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

Enter Case Details

Intake | Eligibility | Characteristics | Other Enrollment Information

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 National Farmworker Jobs Program?
- ( ) Yes
- ( ) No

Co-Enrollment in Indian and Native American Programs?
- ( ) Yes

Co-Enrollment in Vocational Education program?
- ( ) Yes
- ( ) No
- ( ) Unknown

Co-Enrollment in WIOA Vocational Rehabilitation program?
- ( ) Yes
- ( ) VR1
- ( ) Both VR and VR1
- ( ) No
- ( ) Unknown

Co-Enrollment in Wagner-Peyser Employment Service program?
- ( ) Yes
- ( ) Reportable Individual
- ( ) No
- ( ) Unknown

- ( ) No

Co-Enrollment in Veterans' Programs?
- ( ) Yes, DVOP Specialist
- ( ) Yes, LVER Specialist
- ( ) No
- ( ) Unknown

Receiving Employment and Training Services Related to SNAP?
- ( ) Yes
- ( ) No

Co-Enrollment in Other WIOA or Non-WIOA Programs?
- ( ) Yes, Other WIOA or Non-WIOA Programs
- ( ) I/DD, MH or other disability programs
- ( ) No

If Other, please Specify

Participant Interest Job Code

Job Codes

--Select at most 3 Job Codes--

Comments

0 / 2000

Program Introduction

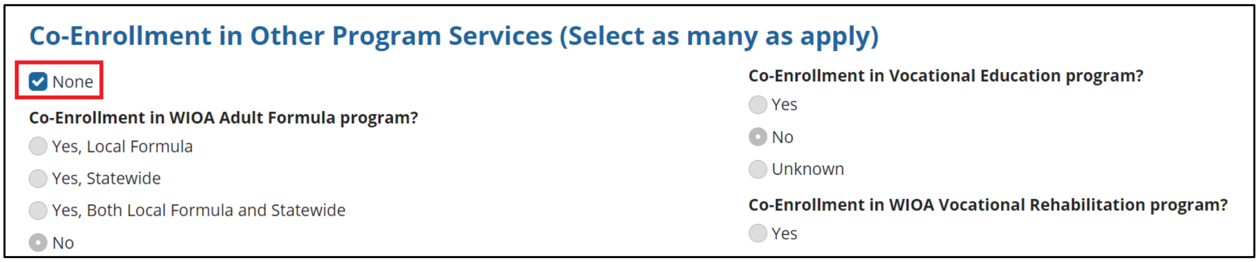
Pre-Assessment Date

mm/dd/yyyy

Program Overview Date

mm/dd/yyyy

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



You can select up to three areas of interest from the **Participant Interest Job Code** dropdown list.

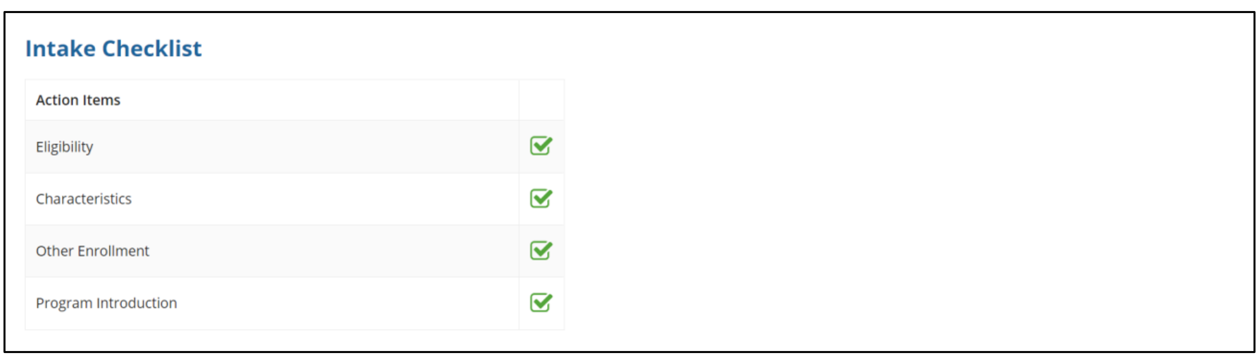
Note: Both the **Pre-Assessment Date** and the **Program Overview Date** must

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

1.5 Intake Checklist

You can track the status of the case intake process using the *Intake Checklist*, displayed below.

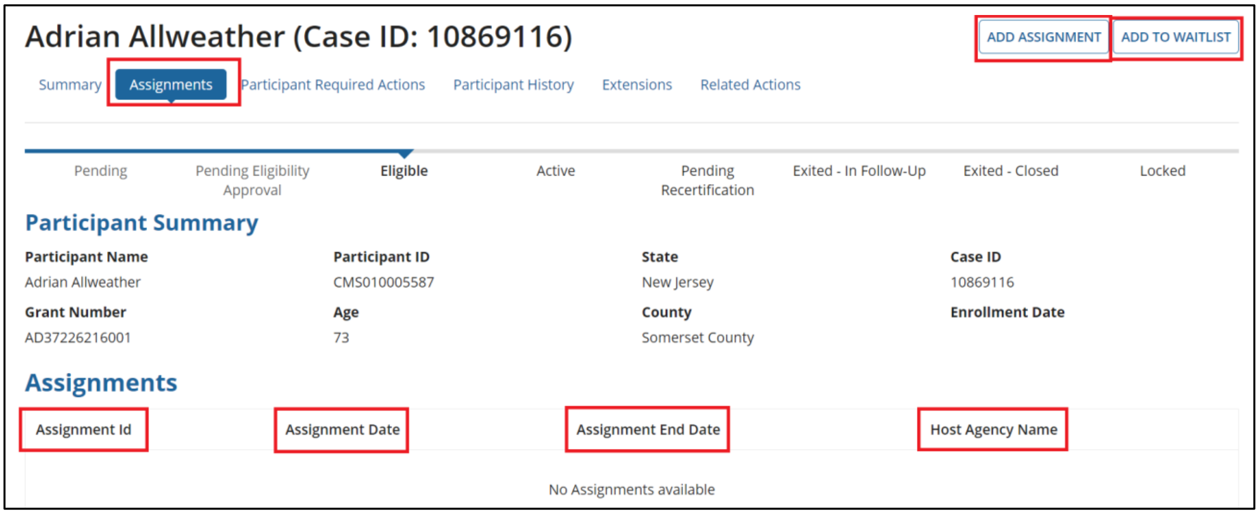
Element of the intake process that are complete are marked by a green check mark. If all required elements have not been completed, the section text appears as a hyperlink that, when clicked, navigates you to the selected section.



2. Assignments

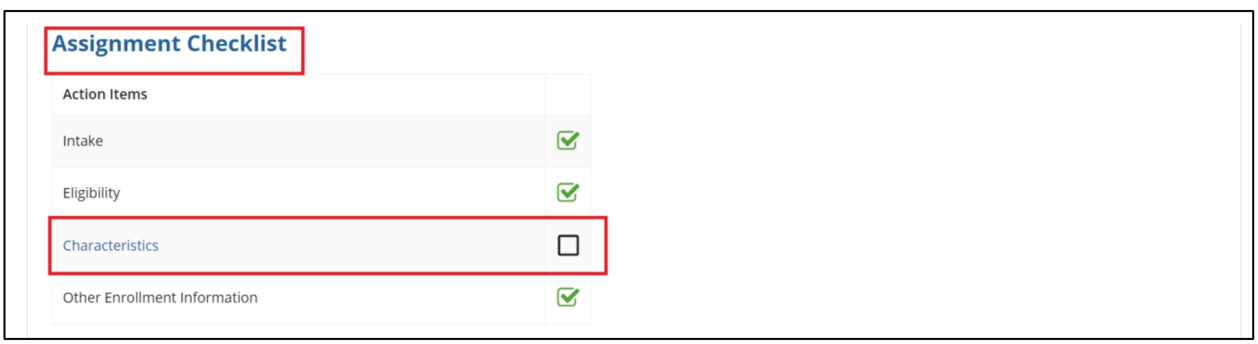
Upon approval of the applicant's eligibility by the Supervisor, the status changes to *Eligible*. Now the assignments can be added to the participant. Assignments can be added, edited, or deleted even after a participant has exited the program. Some of these functions are only available at the level of Supervisor or higher.

The *Assignments* tab displays all assignments for the participant with an **Assignment ID**, **Assignment Date**, **Assignment End Date**, and **Host Agency Name**.



Clicking **Add Assignment** when there are incomplete elements of the intake process navigates you to the *Assignment Checklist* screen, where you can confirm the completion status of action items in the checklist (Intake, Eligibility, Characteristics, Other Enrollment information).

For action items that have not been completed, clicking the unchecked action item (in this example, Characteristics) navigates you to the relevant screen. Some of the fields that were not mandatory during enrollment are mandatory for adding assignments.



After completing all mandatory (*) fields, click **Save + Close**. Once the pending action items are completed, all action items in the *Intake Checklist* are marked with a green check mark. You can then add assignments to the participant's record.

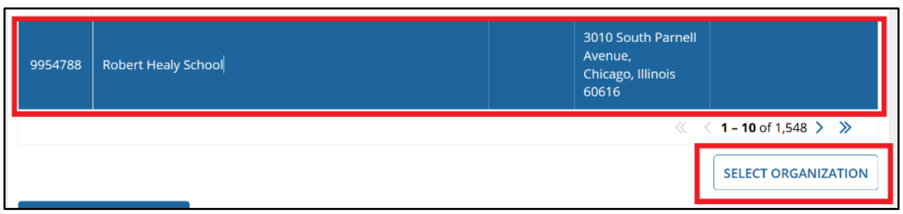
2.1 Add Assignments

To add an assignment:

1. Click **Add Assignment**.

2. Enter the information into the fields on the screen. The **Assignment Date** should not be before the **Eligibility Determination Date**.
3. Click **Search**.

4. Choose **one** of the following options:
   a. Select the agency from the search results: This will display the **Select Organization** button. Click **Select Organization** to add the organization to the Host Agency field.



   b. Click **Add New Host Agency**: This will navigate you to the *Add Organization* screen, where you can enter the host agency information before clicking **Add**.

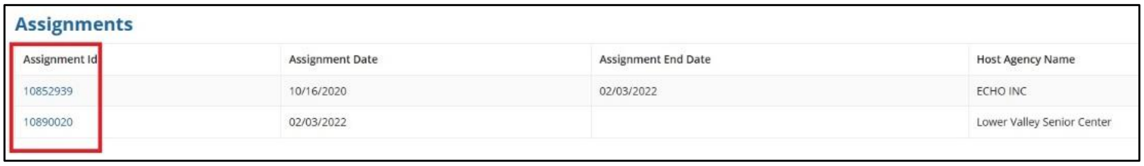
5. Complete all mandatory fields and click **Save**.

Optional fields–such as **Assignment End Date**, **Job Code**, **Workers' Comp Code at Host Agency**–do not have an asterisk (*) next to the field name. Refer to the screenshot below highlighting a required field and an optional field.

2.2 Edit Assignments

Assignment details can be edited after they are initially saved. To edit an assignment:

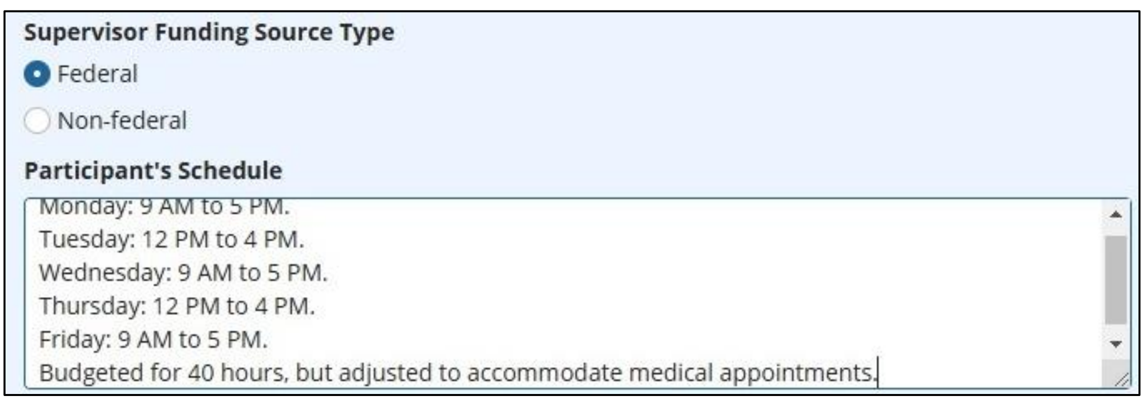
1. Go to the *Assignments* tab.
2. If the participant has multiple assignments, select the **Assignment ID** of the assignment you wish to modify.


Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
10852939	10/16/2020	02/03/2022	ECHO INC
10890020	02/03/2022		Lower Valley Senior Center

3. Click **Edit** on the right side of the screen to make the fields "active" and able to be modified.

4. Select the field(s) you wish to modify and make your changes. For example, in the screenshot below, details have been added to the **Participant's Schedule**.



5. Click **Cancel** to reject the changes or **Save** to modify the assignment details.

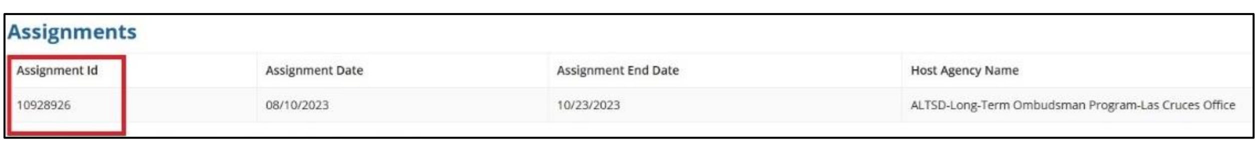
2.3 Delete Assignments

Assignments can be deleted after they are initially created. To delete an assignment:

1. Go to the *Assignments* tab.
2. If the participant has multiple assignments, select the **Assignment ID** of the assignment you wish to delete.
3. To start the deletion process, click the **Delete** icon (🗑).
4. A confirmation message appears: "Confirmation: Are you sure you want to delete this assignment?"
5. Select *Yes* to remove the selected assignment from the participant.

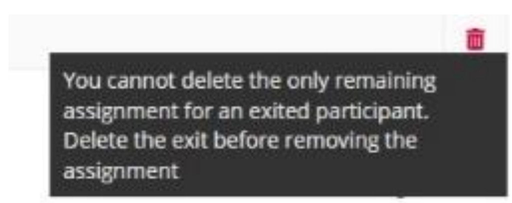
If a participant has multiple assignments and is in the *Active*, *Active – On Break*, *Exited – In Follow-Up*, or *Active – Closed* status, you can remove listed assignments.

However, if the participant is in the *Exited – In Follow Up* or *Exited – Closed* status and only has one assignment listed, you will see a warning flag that states: "You cannot delete the only remaining assignment for an exited participant. Delete the exit before removing the assignment." (Deleting the Exit will change the participant's status back to *Eligible*.)



Assignments

Assignment Id	Assignment Date	Assignment End Date	Host Agency Name
10928926	08/10/2023	10/23/2023	ALTSD-Long-Term Ombudsman Program-Las Cruces Office



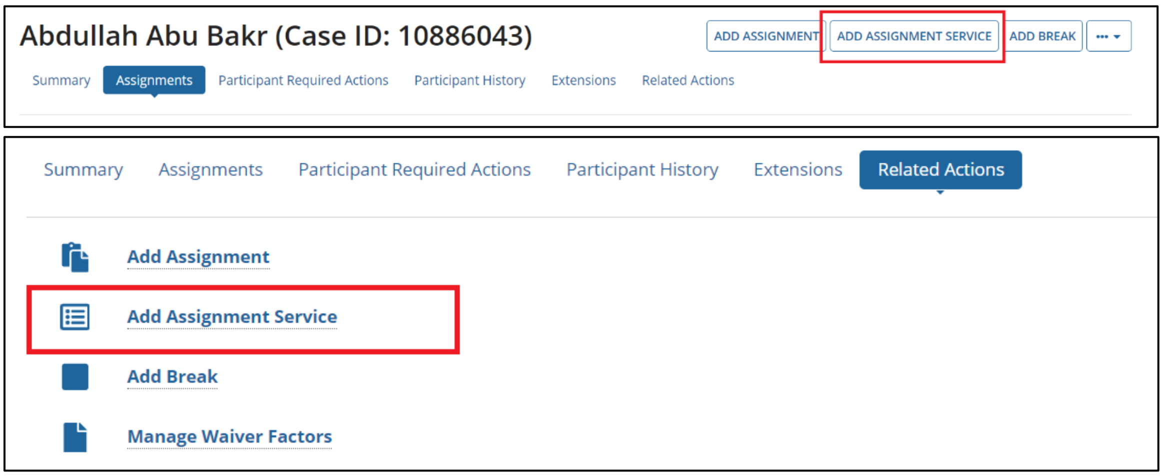
Some optional fields are linked to other parts of the system, so if you edit them you will see a warning flag.

3. Add Services

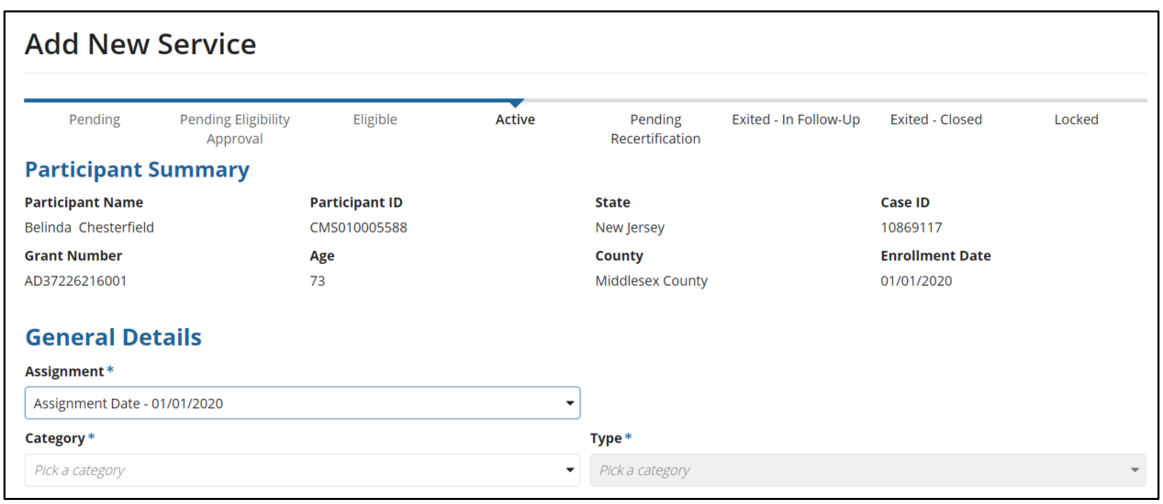
Once the participant enrolls in the program, participants can avail themselves of any of the services listed in *Service Details* to get trained for employment.

To add a new service:

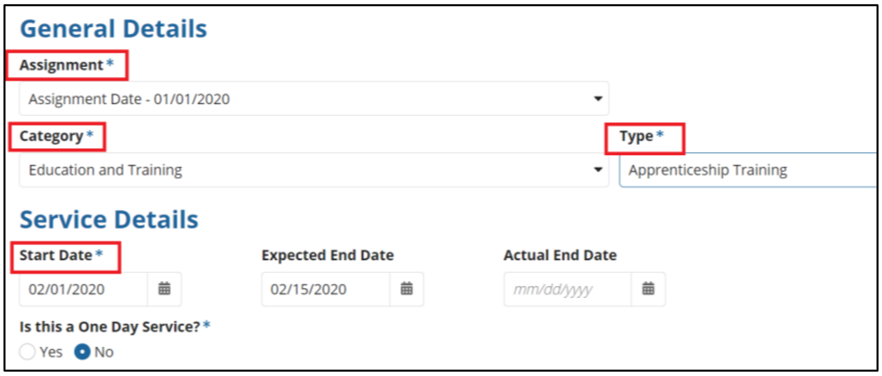
1. Clicking **Add Assignment Service** in the upper right-hand corner of the *Assignments* tab or on the *Related Actions* tab.



2. Either of these actions will open a new *Add New Service* screen:



3. Select the **Category** and **Type** in which the participant wants to get trained and enter the **Start Date**.

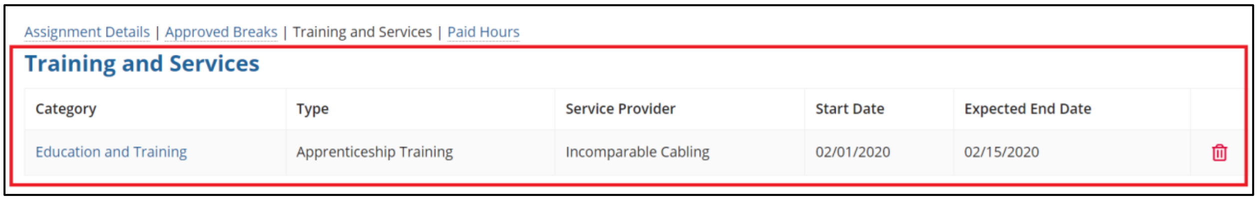


4. The bottom section of this screen has additional fields. To display a list of service providers, enter the following and select **Search**:
   a. State
   b. City
   c. Organization name

5. From the list of results, select an agency and click **Select Organization**. The selected agency is displayed in the **Provider** field.

6. To add another service, click the **Save + Add Another** button.
7. To save the current service without adding another, click the **Save + Close** button.

Added services are updated in **Training and Services**, as shown below:



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.

Note:

- The **Provider** field is required for Education and Training category services but is optional for Supportive Services.
- If a participant is on break, only a Supportive Service may be added.
- If a previous Education and Training service exists that was created while the participant was not on break, the service cannot be edited while the participant is on break. To edit the service, the participant must be temporarily taken off break. Following the edit, the participant should be put back on break.

4. Breaks

4.1 Add Break

1. To add a break to a participant (with a status of either active or exited), click **Add Break**. For cases with a status of *Active*, you can also add a break from the *Related Actions* tab.

2. Enter the break information, then click **Save**. Break start dates may not be later than the end of the assignment end date. An error message is displayed if the start date of the break does not meet this requirement.

3. The status of the participant changes to *Active-On Break* once a break record is entered.

4. To verify and edit approved breaks, click **Approved Breaks**.

5. Click the **Break ID** (which is formatted as hyperlinked text) to display the *Break in Services* details screen.
6. Click **Edit** to modify the details of the break record.
7. At the bottom of the screen, the **Cancel** and **Save** buttons allow you to negate the changes or save the changes.

4.2 Delete Break

Users can delete approved breaks without contacting SCSEP Help.

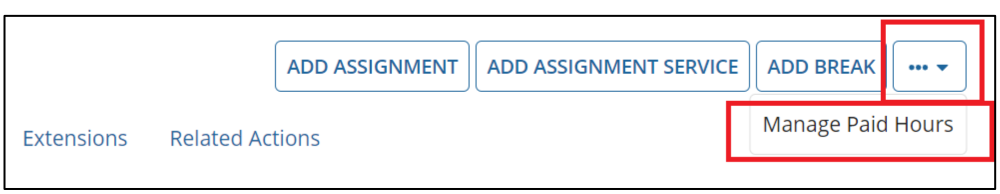
1. Click **Assignments**.
2. Click **Approved Breaks**.
3. Click the **Delete Break** icon ( ).

The deletion or end of the break is reflected in all relevant reports and the case is once again reported as active.

5. Manage Paid Hours

The participant's paid hours can be edited here.

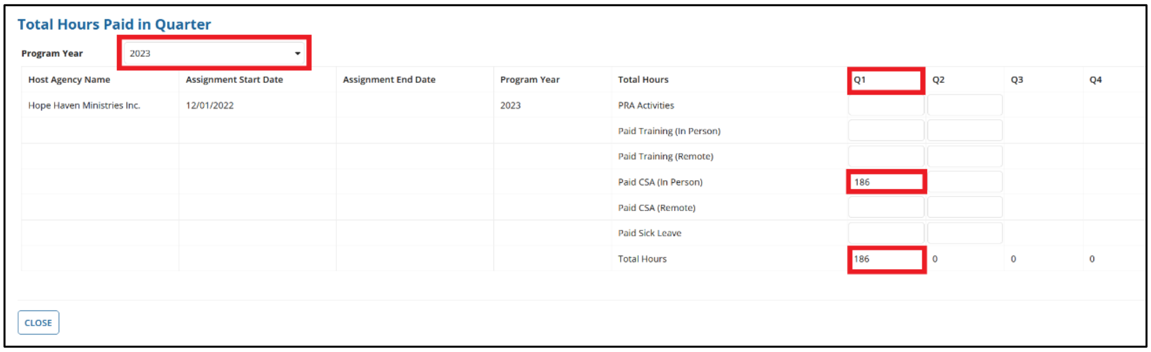
1. Click **Manage Paid Hours**. You can also navigate to this screen from the *Related Actions* tab.



2. This screen displays information about the **Host Agency Name** and **Assignment Start Date**.

3. Enter the number of hours for each activity in the associated quarter.
    a. You can also add paid hours for the previous program year. To access previous program years, select the appropriate year from the **Program Year** dropdown list.
    b. Once the number of hours has been entered, the **Total Hours** is updated.

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



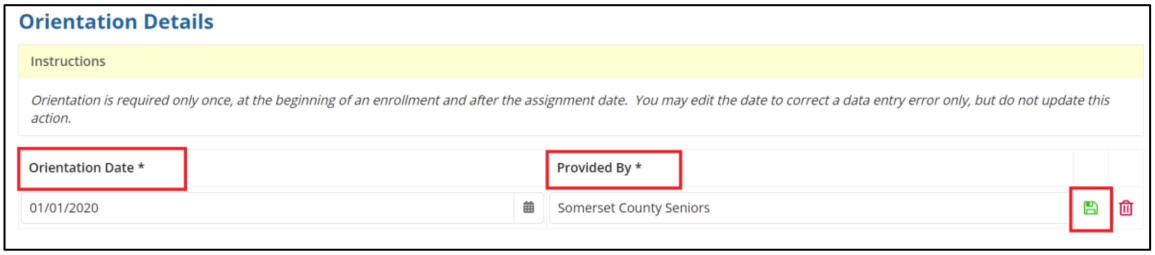
6. Participant Required Actions

On the *Participant Required Actions* screen, you can enter data to record orientation, physical exam, safety consultation or assessment records for participants. Once entered and saved, this information will appear on the *Participant Required Actions* screen under its respective header.

6.1 Orientation Details

To add orientation details for a participant:

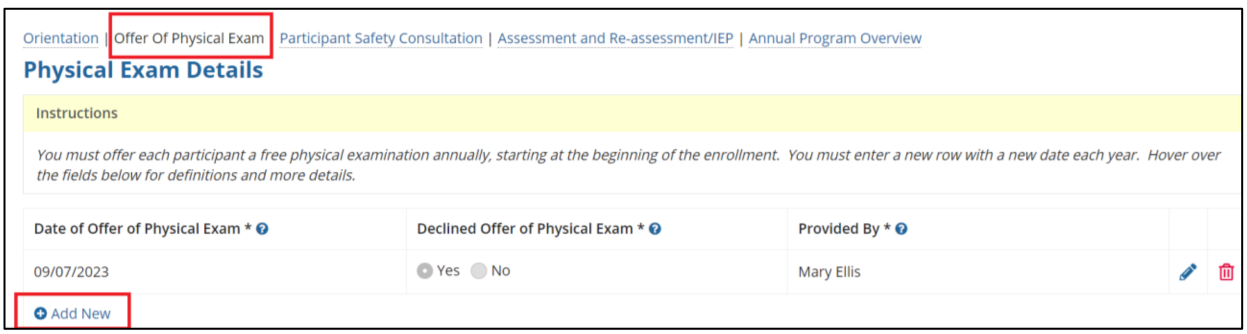
1. In the *Orientation* section, click the **Add New** button (⊕).
2. Once the information about the orientation is entered, the **Save** icon becomes visible.



a. Click the **Save** icon ( ) to save the data.
b. Click the **Delete** icon ( ) to delete the data.

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

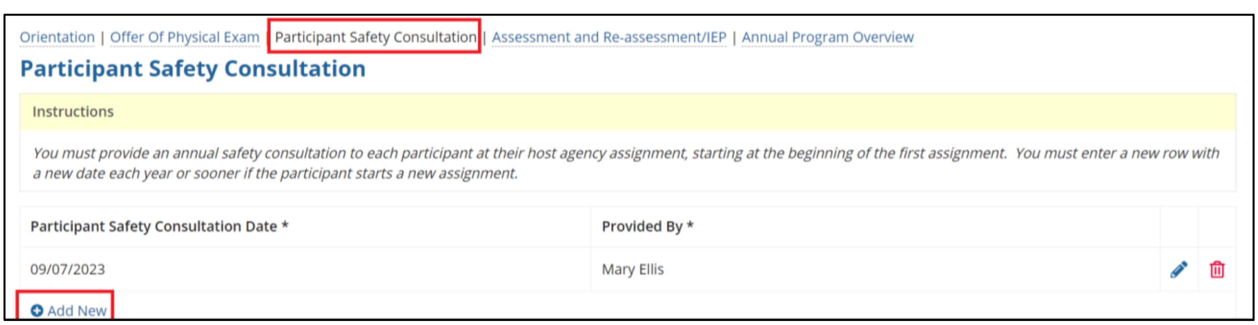
6.2 Offer of Physical Exam



To add physical exam information:

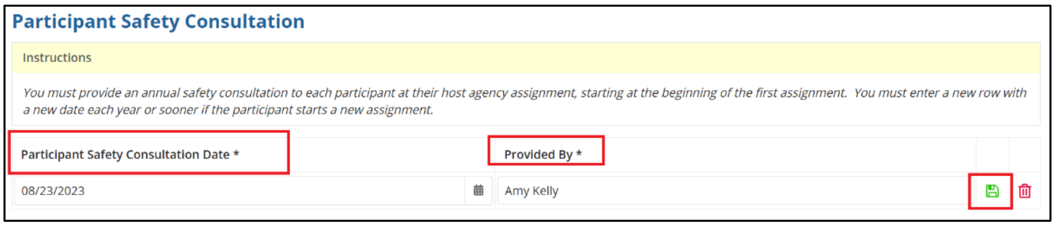
1. In the *Offer of Physical Exam* section, click the **Add New** button ( ).
2. Once the information about the physical examination offer is entered, the **Save** icon becomes visible.
   a. Click the **Save** icon ( ) to save the data.
   b. Click the **Delete** icon ( ) to delete the data.

6.3 Safety Consultation Details

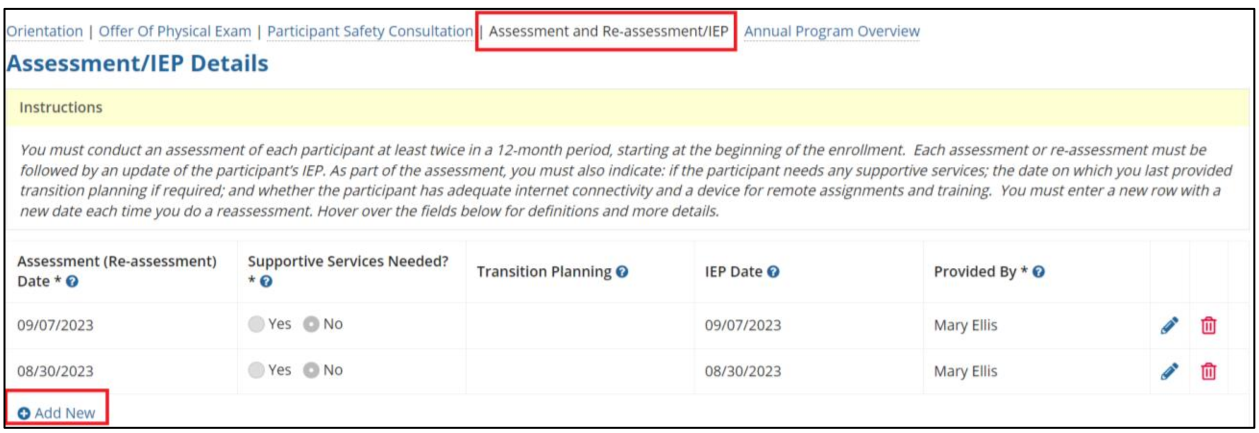


To add safety consultation details for a participant:

1. In the *Participant Safety Consultation* section, click the **Add New** button ( ).
2. Once the information for the safety consultation is added, the **Save** icon becomes visible.
    a. Click the **Save** icon ( ) to save the data.
    b. Click the **Delete** icon ( ) to delete the data.



6.4 Assessment Details

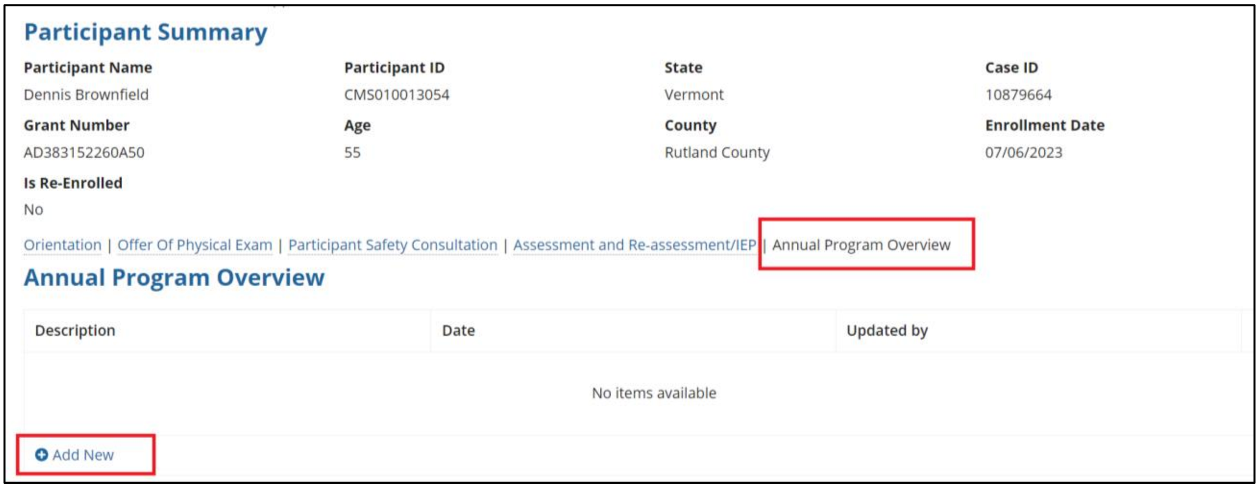


To add assessment details for a participant:

1. In the *Assessment and Re-assessment/IEP* section, click the **Add New** button ( ).
2. Once the information is entered, the **Save** icon becomes visible.
    a. Click the **Save** icon ( ) to save the data.
    b. Click the **Delete** icon ( ) to delete the data.

6.5 Annual Program Overview

An optional **Annual Program Overview** field captures annual updates where participants are reminded of policies and services.

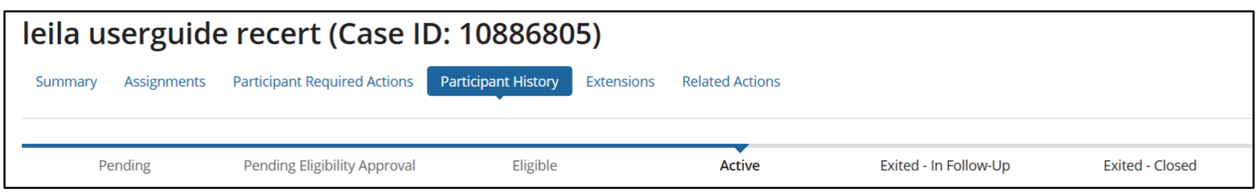


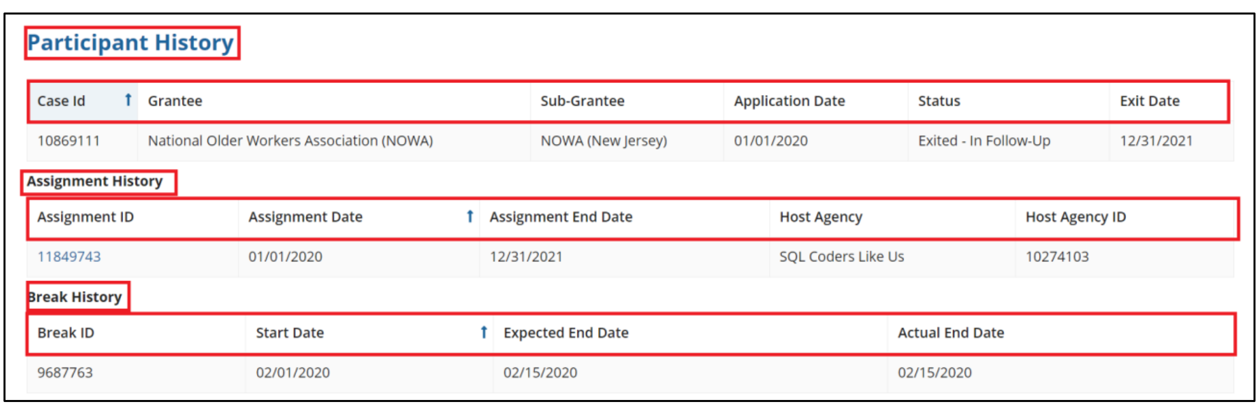
To add Annual Program Overview details for the participant:

1. In the *Annual Program Overview* section, click the **Add New** button ( ).
2. Once the **Description** is entered, the **Date** will automatically be populated with the current date, and **Updated by** will automatically populated with the name of the person who entered the **Description**.
3. The **Save** icon becomes visible:
    a. Click the **Save** icon ( ) to save the data.
    b. Click the **Delete** icon ( ) to delete the data.

7. Participant History

The *Participant History* screen displays 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**
3. **Sub-Grantee**
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. After clicking it, the user is redirected to the assignment screen 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 participant's assignments. The table displays the following columns:

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

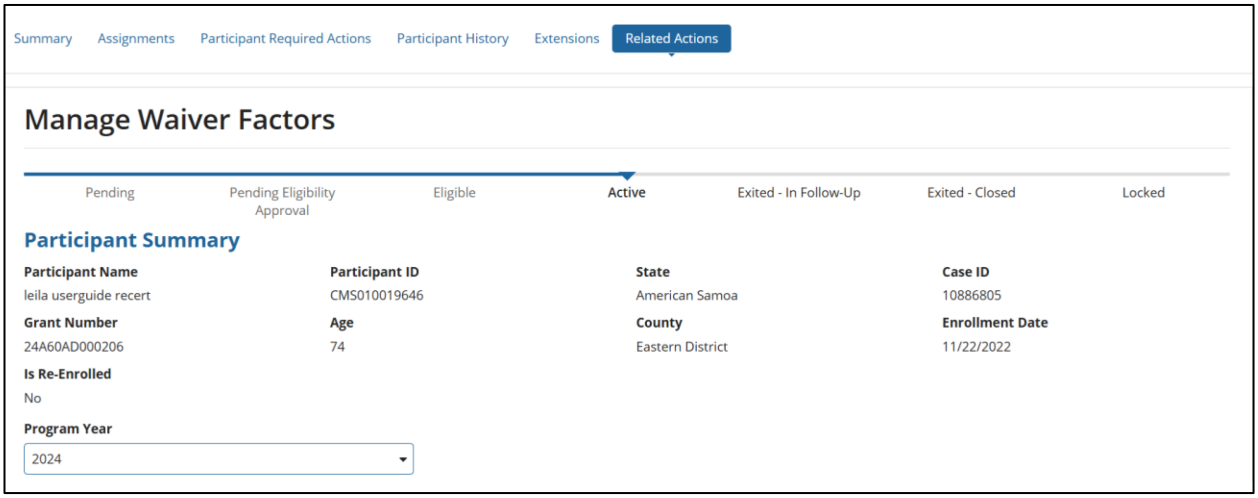
8. Related Actions

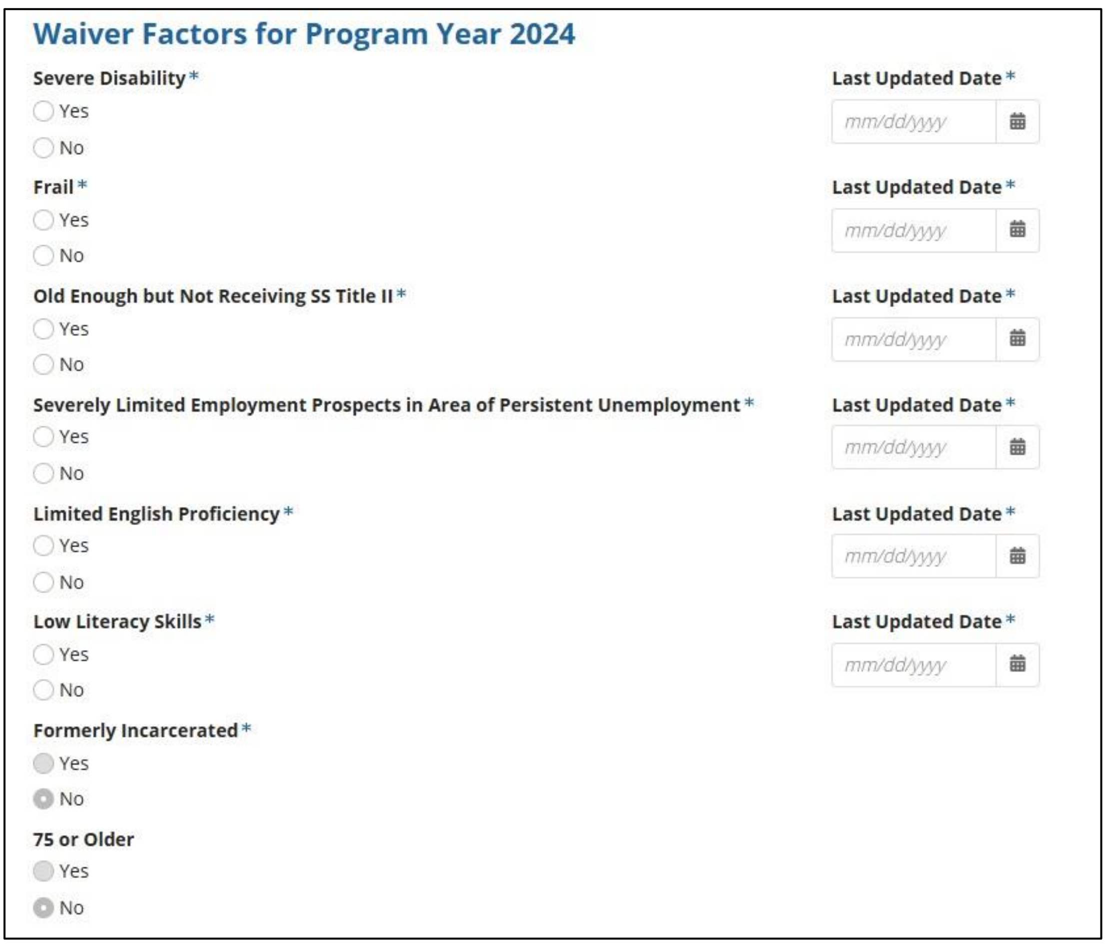
This section lists the actions that can be performed for a participant. The following table lists actions available based on the case status. (Note: Not all roles are authorized to perform all the actions listed below. See the user role permission matrix for details on available actions by role.)

	Pending	Pending Eligibility Approval	Eligible	Withdrawn	Ineligible	Active	Active – On Break	Waitlist	Locked	Exited – Closed	Exited – In Follow Up
Edit case	X	X	X	X	X	X		X		X	X
Withdrawn	X	X	X		X			X			
Add to waitlist			X								
Manage physical exam						X					
Manage paid hours						X	X			X	X
Move case						X	X				
Transfer case						X	X				
Add participant required action						X				X	X
Recertify case						X	X				
Manage program introduction			X				X				
Manage assignments						X		X		X	X
Add assignment service						X					X
Manage training and services						X					X
Manage breaks in service						X					X
Manage waiver factors	X	X	X			X	X				
Manage extensions					X		X	X			
Add exit							X	X			
Modify exit										X	X
Manage / Add placements / Add placement service											X

8.1 Manage Waiver Factors

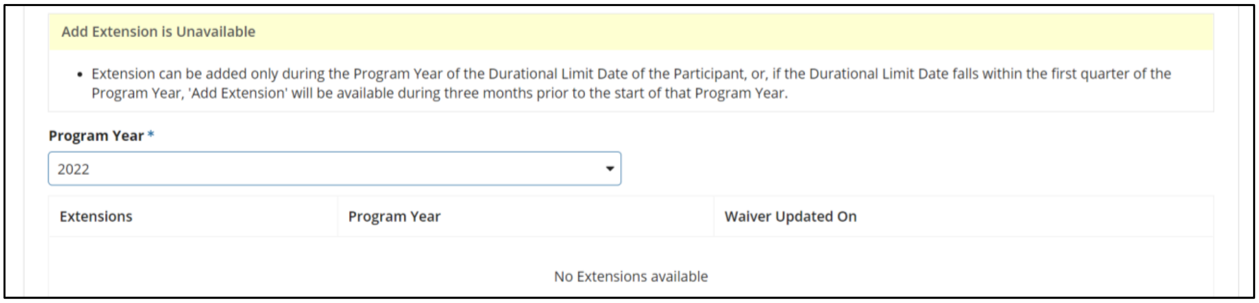
Use the form displayed below the summary to enter updates to waiver factors for a selected program year. The **Program Year** dropdown list contains the current and prior program years. The field **75 and Older** is determined based on the date of birth of the participant and is strictly informational.





8.2 Manage Extensions

You can view extensions granted to a participant through the *Extensions* screen.



Once you select a program year, the extension is shown in a table with the following columns:

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

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

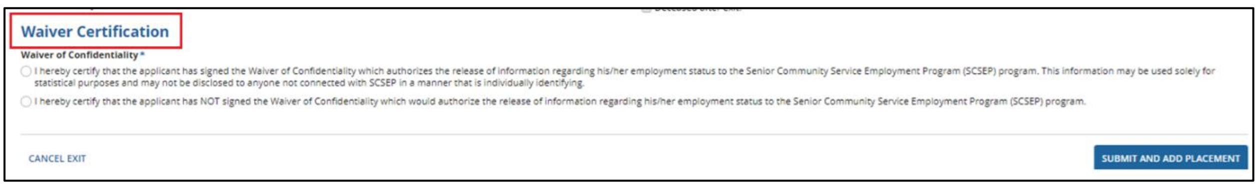
> "Extensions can be added only during the Program Year of the Durational Limit Date of the Participant, or, if the Durational Limit Date falls within the first quarter of the program year. Add Extension will be available during the three months prior to the start date of that Program Year."

If the participant is eligible for an extension, a white button labeled **Add** appears below the participant summary. Clicking **Add** will navigate the Grantee Administrator or Program Analyst to the *Add Extension* screen.

8.3 Add Exit

This form allows you to add an exit to a case. The following fields are among those displayed below the participant summary:

- **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.
- **Category of Exit**: A dropdown list displays two categories of exit:
    - **Unsubsidized Employment:** Displays the **Unsubsidized Employment Type** field and two radio buttons labeled *Regular Employment* and *Self-Employment*.
    - **Other Reason for Exit:** Displays the **Other Reason for Exit** field. Selecting *Exclusions at Exit* displays the **Exclusions at Exit** dropdown list.
- **Waiver of Confidentiality**:
    - Selecting *Unsubsidized Employment* as the **Category of Exit** displays a button labeled **Submit and Add Placement.** Click the button to navigate to the *Placement* screen.
    - Selecting *Other Reason for Exit* as the **Category of Exit** displays a button labeled **Submit and Close**. Note: You cannot 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. When this button is clicked, the exit is not saved.

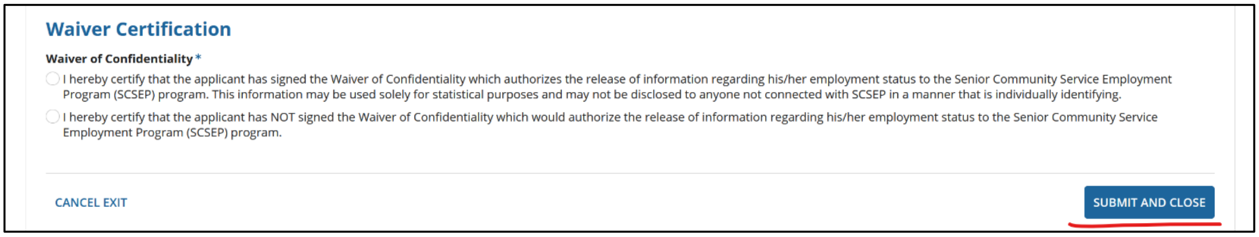
Note: This exit data can be modified in the future by selecting **Modify Exit** on the *Related Actions* tab:

This will present you with the option to either delete or edit the participant's exit.

- To delete the exit, click **Delete** and follow the prompts on the following screens.

- To edit the exit, click **Edit**. The same fields that were available when the exit was added are now available to be edited.

After completing your edits, select one of the choices for **Waiver Certification – Waiver of Confidentiality**, and click **Submit and Close**.



8.4 Add Placement

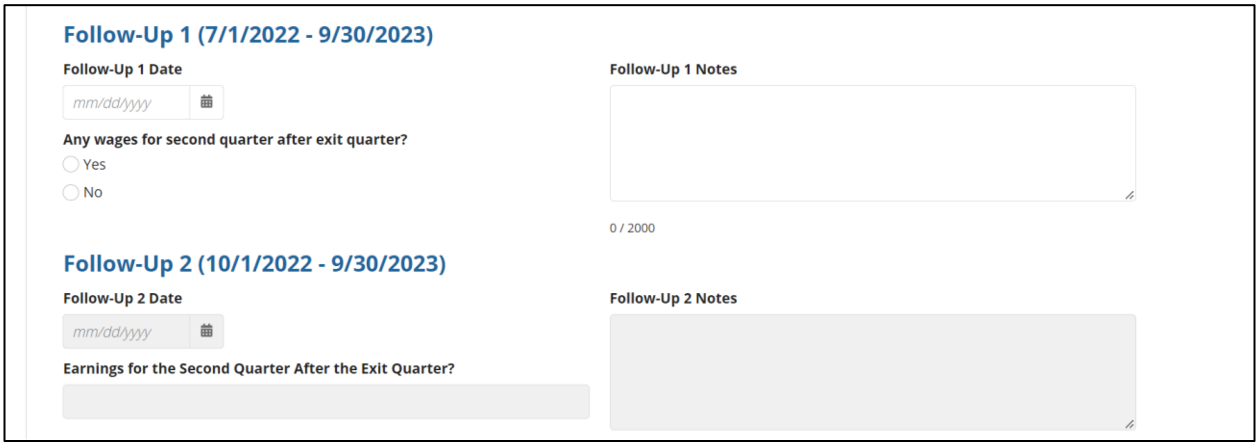
This section is for adding a placement for the participant. Once the exit has been added to the participant with **Category of Exit** = *Unsubsidized Employment*, the status of the participant changes to *Exited-In Follow-Up*.

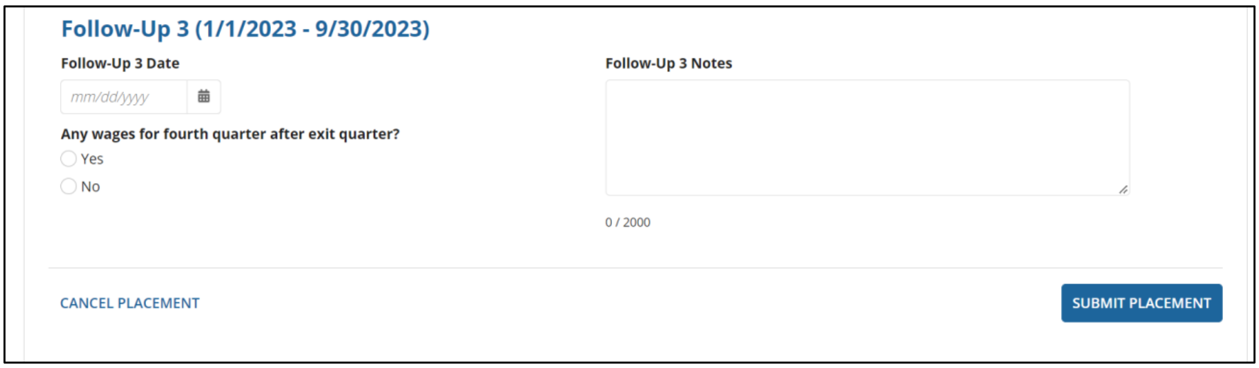
The **Is Re-Enrolled** field notes whether the participant has been re-enrolled in SCSEP within 90 days of an exit.

Enter all placement details and click **Submit Placement**:

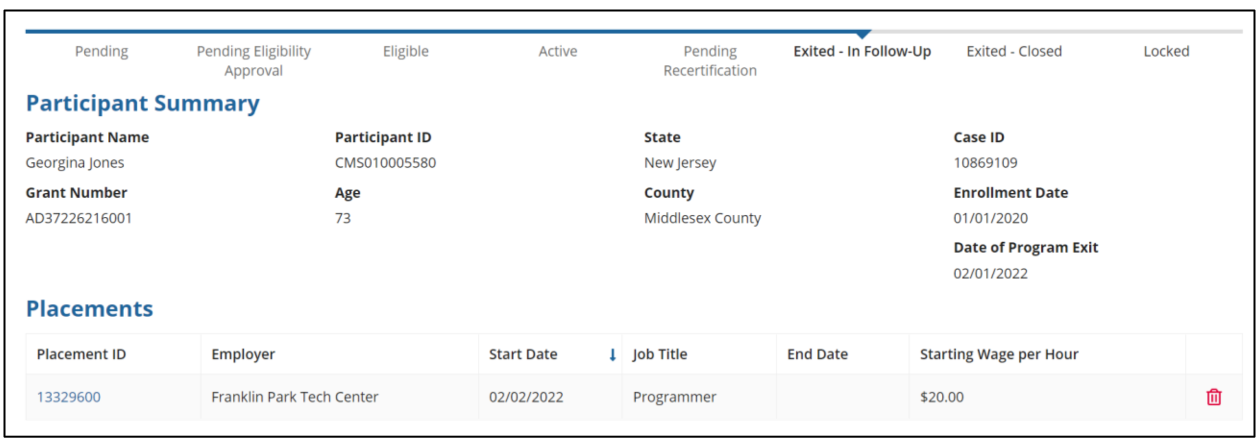
Note: When **Self-Employed** = *Yes*, the **Job Code** defaults to *Self-Employment*, and the **Employer** defaults to the participant's first and last name. However, the employer's name can be changed as needed.

![CIO - Office of the Chief Information Officer]





Once the placement details have been entered, the participant summary is updated.



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

9. Right of Return

To enter Right of Return data:

1. Click on the **Placement ID** number.

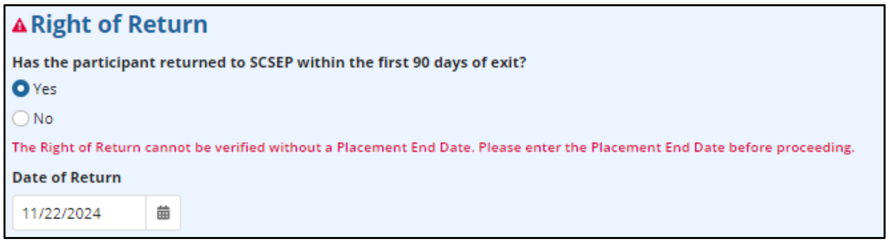
2. Scroll down to the *Right of Return* section and click **Edit**.

3. Enter the applicable data and select **Save**.
4. Note:
    a. 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.
    b. 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 days in that placement.

    In the image below, the participant was employed full-time for more than thirty 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 days; therefore, he/she will be allowed the Right of Return:

    c. Right of Return data cannot be saved if the **Placement End Date** is not entered. The following message will appear: "The Right of Return cannot be verified without a Placement End Date. Please enter the Placement End Date before proceeding."



Right of Return

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

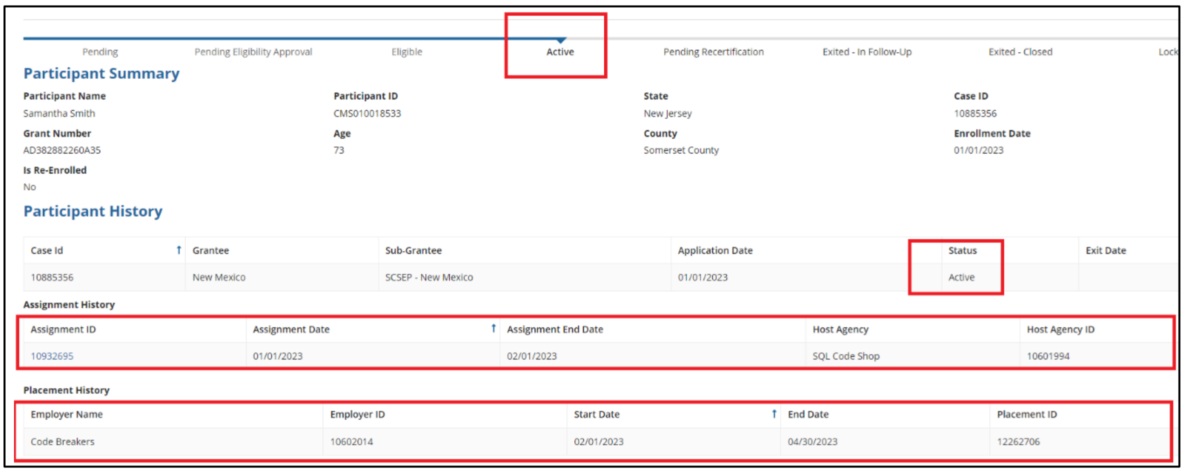
- (•) Yes
- ( ) No

The Right of Return cannot be verified without a Placement End Date. Please enter the Placement End Date before proceeding.

Date of Return

11/22/2024

5. After entering the **Date of Return** and clicking **Save**, the status of the participant will change from *Exited-In Follow-Up* to *Active*. The *Participant History* section will display the previous assignment(s) and placement(s) and the participant can now be given a new assignment in the program.



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

Participant Summary

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

Participant History

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

Assignment History

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

Placement History

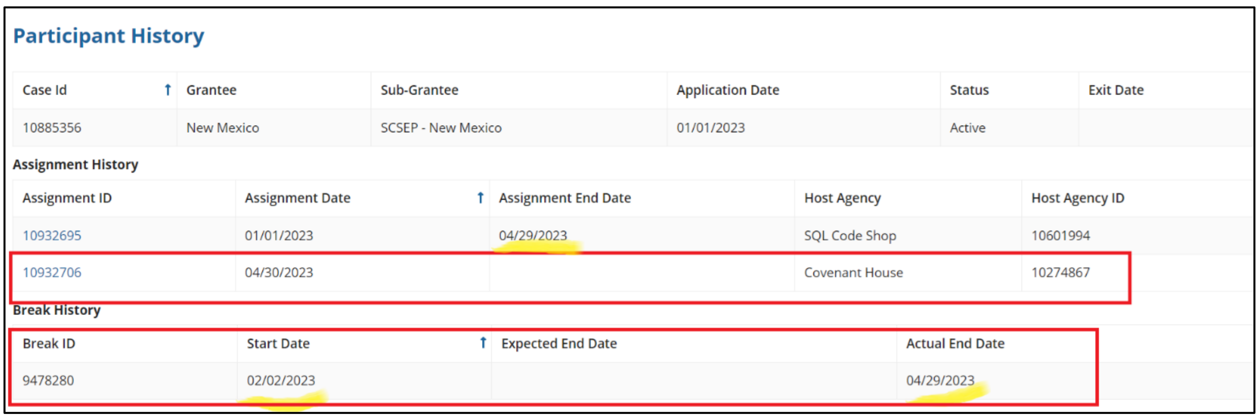
Employer Name	Employer ID	Start Date	End Date	Placement ID
Code Breakers	10602014	02/01/2023	04/30/2023	12262706

6. 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.

In the example above, since the date of return was 4/30/2023, 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 the "Add Break" section of this document 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

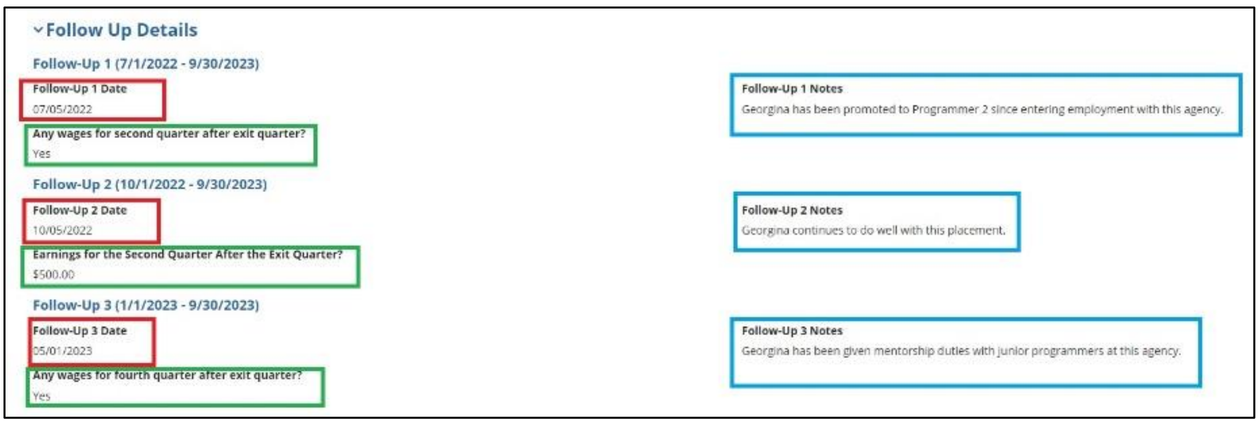
10. Manage Follow-Ups

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

On this form, the date ranges are automatically generated by the system. These are the earliest and latest dates by which the relevant follow-up should be completed. Enter the 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:

The screenshot below shows an example of a participant's placement with all three follow-ups completed:



11. Add Placement-Related Service

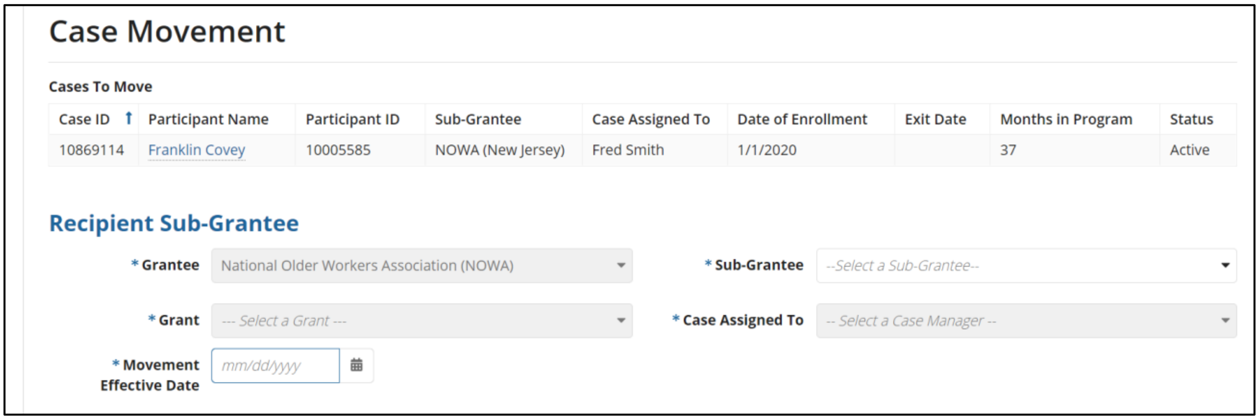
To add a service to a participant who has been placed in unsubsidized employment:

1. Click **Add Placement-Service** in the upper right-hand corner of the *Placements/Follow-ups* tab. The *Add New Service* screen appears, which can also be accessed from the *Related Actions* tab.
2. Enter the information into the fields to add a service. As you complete the *General Details* section, subsequent fields will become active or appear.
3. At the bottom of the screen 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. Details are displayed by clicking on the hyperlink name (e.g., **Follow-Up Services**). To delete a record, click the **Delete** icon (🗑).

12. Move/Transfer Case

12.1 Move Case



Case Movement

Cases To Move

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

Recipient Sub-Grantee

* Grantee	National Older Workers Association (NOWA)	* Sub-Grantee	--Select a Sub-Grantee--
* Grant	--- Select a Grant ---	* Case Assigned To	-- Select a Case Manager --
* Movement Effective Date	mm/dd/yyyy		

A participant's case can be moved from one sub-grantee to another.

1. The **Grantee** field is filled by default.
2. Selecting a value for the **Sub-Grantee** field will automatically populate the **Grant** field.
3. Enter the **Movement Effective Date**.
4. Select the **Case Manager**.
5. Click **Submit** to move the case.

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

Case Movement

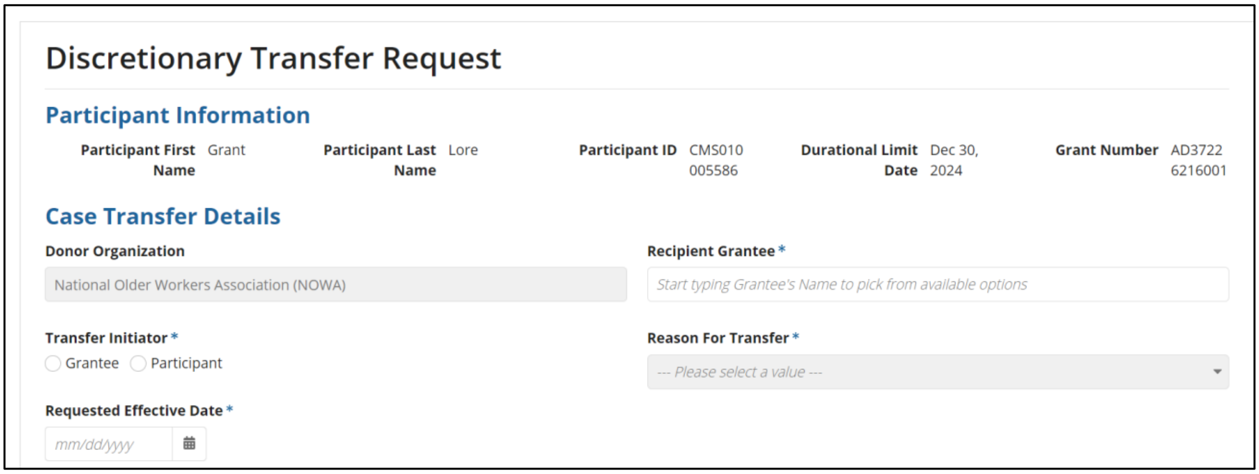
Cases To Move

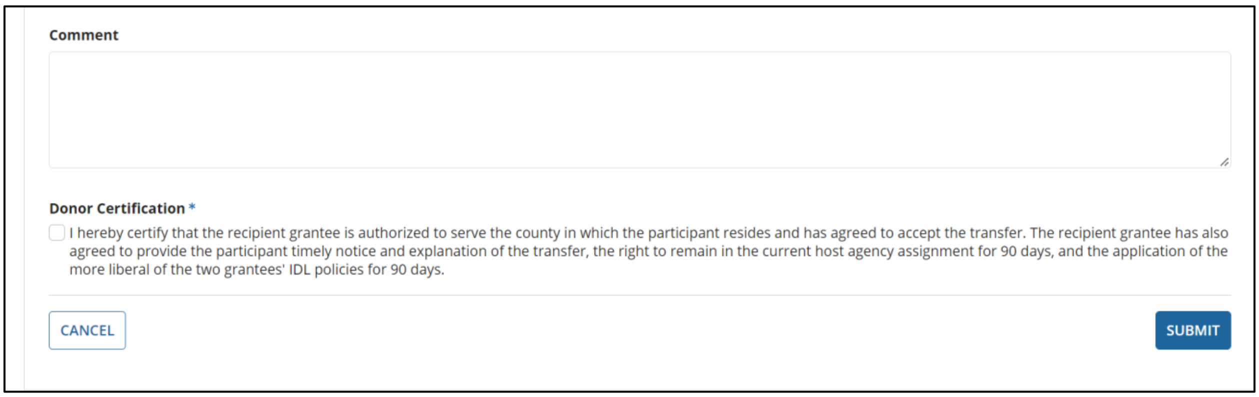
Case ID	Participant Name	Participant ID	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
10869114	Franklin Covey	10005585	NOWA (California)	Fred Smith	1/1/2020		37	Active

12.2 Transfer Case

Participants can be moved from one grantee to another. Note that an assignment is created for the recipient record from the donor record after a transfer. Donor grantees can retroactively add or edit an assignment after a participant has exited due to a transfer.

An on-screen error message will appear if the assignment date, assignment start date, or assignment end date is later than the exit date. The requested effective date may not be between the assignment date and the assignment end date.





1. The **Donor Organization** field is filled by default.
2. Select a value for the **Recipient-Grantee** field.

3. Choose an option for **Transfer Initiator**.
   a. If the *Grantee* option is chosen:
      i. Select the **Reason for Transfer**.
      ii. Enter the **Requested Effective Date**.
      iii. Acknowledge the **Donor Certification**.
      iv. Click **Submit** to save changes.

   b. If the *Participant* option is chosen:
      i. Select the **Reason for Transfer**.
      ii. Enter the **Requested Effective Date**.
      iii. Complete the mandatory (*) fields in **Residence Address After Transfer**.
      iv. Acknowledge the **Donor Certification**.
      v. Click **Submit** to save changes.

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.

To recertify a participant:

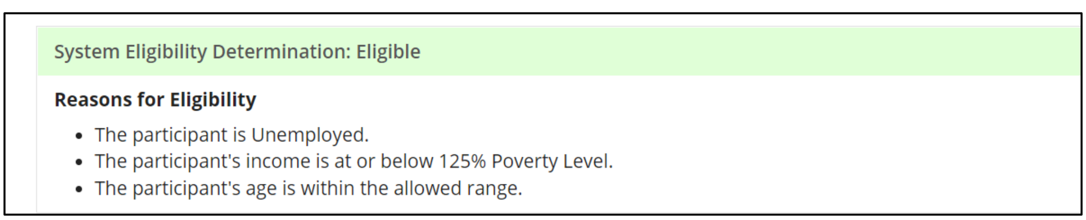
1. Enter a value for
    a. **Recertification Date**
    b. **Number in Family**
    c. **Total includable Family Income for the Eligibility Period**

2. Choose an option for
    a. **Total Includable Family Income**
    b. **Signature of Participant on Recertification**
    c. **Signature of Director or Authorized Representative on Recertification**

3. The instructions for the **Total Includable Family Income** field are as follows:
    a. For the **12-month period**: “Total includable family income during the 12-month eligibility determination period.”
    b. For the **6-month period**: “Total includable family income during the 6-month eligibility determination period, annualized.”

4. **Save + Continue**:
    a. Selecting *No* for **Signature of Participant on Recertification** or **Signature of Director or Authorized Representative on Recertification** will not allow you to click **Save + Continue**.
    b. Selecting *Yes* for **Signature of Participant on Recertification** or **Signature of Director or Authorized Representative on Recertification** allows you to click **Save + Continue**.

5. Upon clicking **Save + Continue**, **Recertification Eligibility Determination** is displayed.

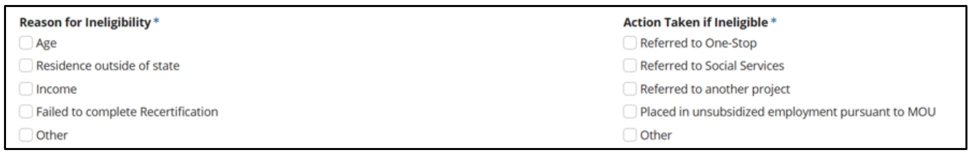


Recertification Eligibility Determination

SCSEP Eligible? *

- Yes
- No

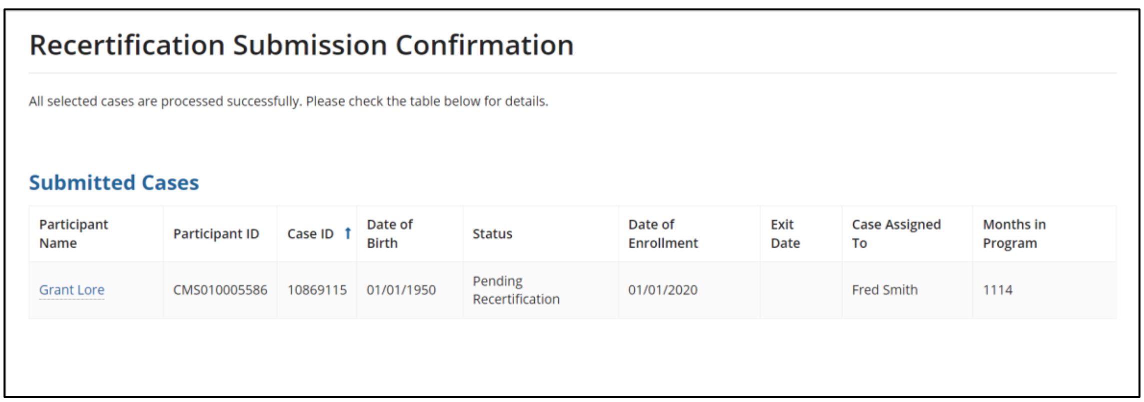
6. Choose an option for **SCSEP Eligible**.
    a. If *No* is selected:
        i. Select at least one checkbox under **Reason for Ineligibility** and an **Action Taken if Ineligible**.
        ii. Provide an explanation in the **Comment** field.



Reason for Ineligibility *	Action Taken if Ineligible *
Age	Referred to One-Stop
Residence outside of state	Referred to Social Services
Income	Referred to another project
Failed to complete Recertification	Placed in unsubsidized employment pursuant to MOU
Other	Other

    b. If *Yes* is selected:
        i. Space is provided to add an optional **Comment**.
        ii. Click **Submit** to proceed.

7. Click **Submit**. The *Recertification Submission Confirmation* screen will appear.

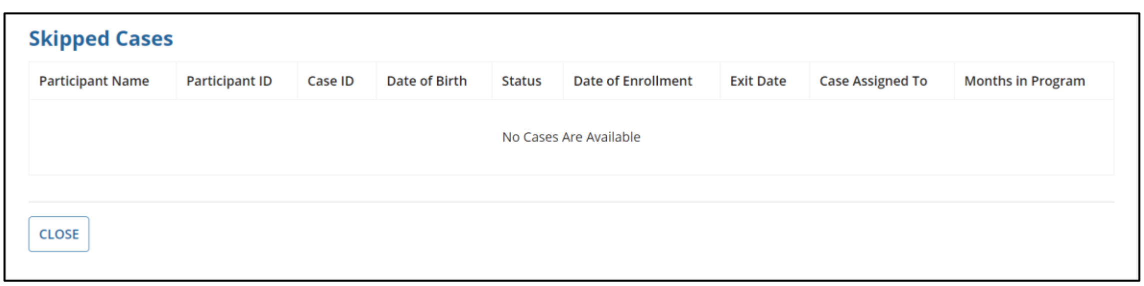


Recertification Submission Confirmation

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

Submitted Cases

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



Skipped Cases

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

CLOSE

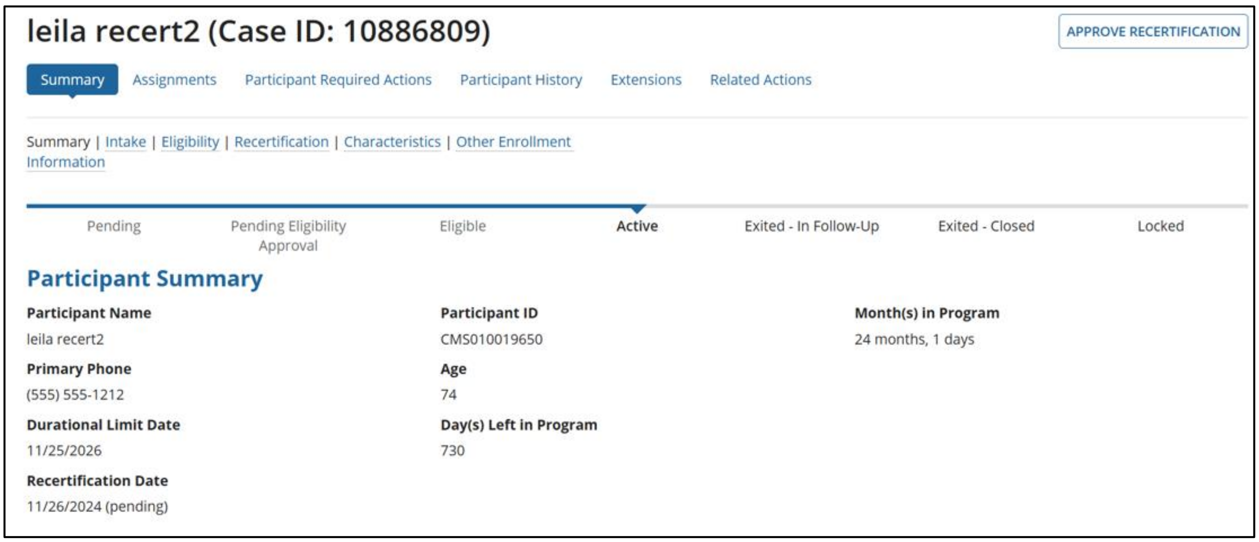
Note:

When a recertification is submitted by a Case Manager and is awaiting a Supervisor's approval, the recertification details are not displayed on the *Recertification* screen until the recertification is approved.

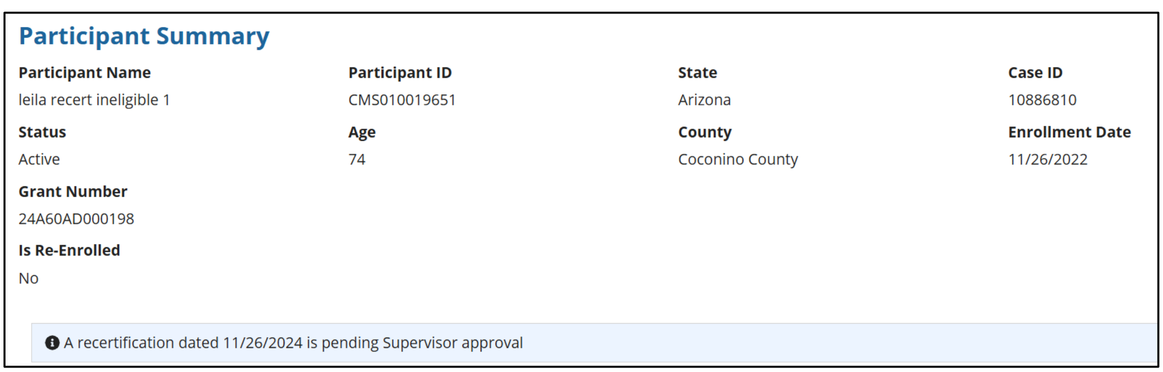
If there are previously approved recertifications on the screen, the pending recertification message appears at the top of the list.

If a recertification is pending a Supervisor's approval and a user updates the most recent assignment for the case, the **Approve Recertification** button remains on the Supervisor's screen and the **Recertify Case** option does not appear in *Related Actions* for any user.

The **Recertification Date** on the participant's *Summary* tab appears in the following format for a pending recertification: "MM/DD/YYYY (pending)"

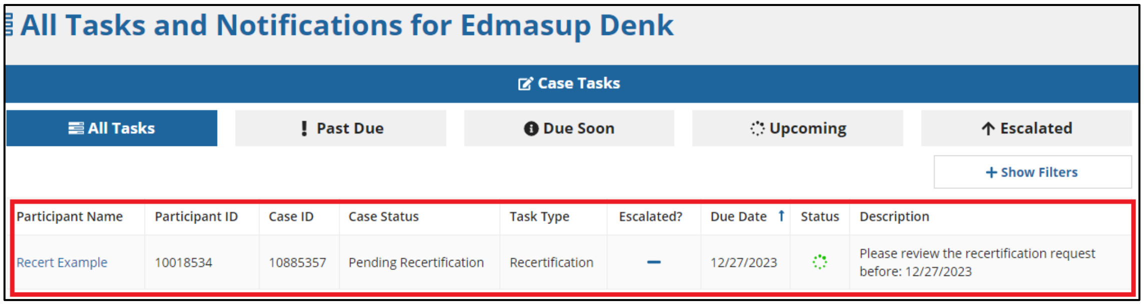


When a recertification is pending a Supervisor's approval, the following message is displayed: "A recertification dated MM/DD/YYYY is pending Supervisor approval."



Recertifications must be approved by a Supervisor or higher-level user.

1. The Supervisor (or higher-level user) will receive a task to approve the recertification:



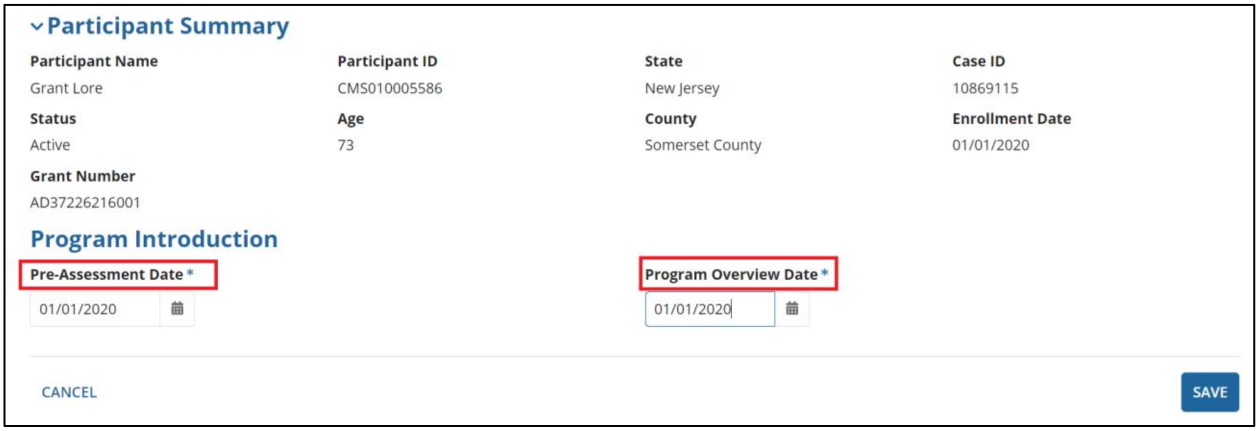
2. After receiving the notification, the approver can edit recertification data prior to approval. Otherwise, the approver should click **Approve Recertification** to continue.

3. 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.

4. If the recertification is approved, click the checkbox to authorize. The **Recertification Determination Date** can also be changed.

14. Manage Program Introduction

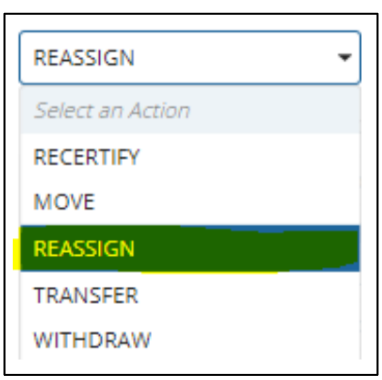
In this section, **Program Introduction** is managed by editing the **Pre-Assessment Date** and **Program Overview Date**. Click **Save** to save the changes.



15. Assign Case

Supervisors, Sub-Grantee Administrators, and Grantee Administrators can reassign existing cases within a sub-grantee to a different Case Manager.

1. Select **Cases** from the main navigation bar.
2. Click **Show Filters**.
3. Click **Reset** to clear all selections and begin a new search.
4. Select the **Grantee**, **Sub-Grantee**, and **Case Assigned To**.
5. Click **Search**. This will display all cases assigned to the selected individual.
6. Select the case(s) to be reassigned or select the top box to select all cases.
7. Continue selecting cases until you have selected all of the cases to be reassigned.
8. Select *Reassign* from the **Select an Action** dropdown list.

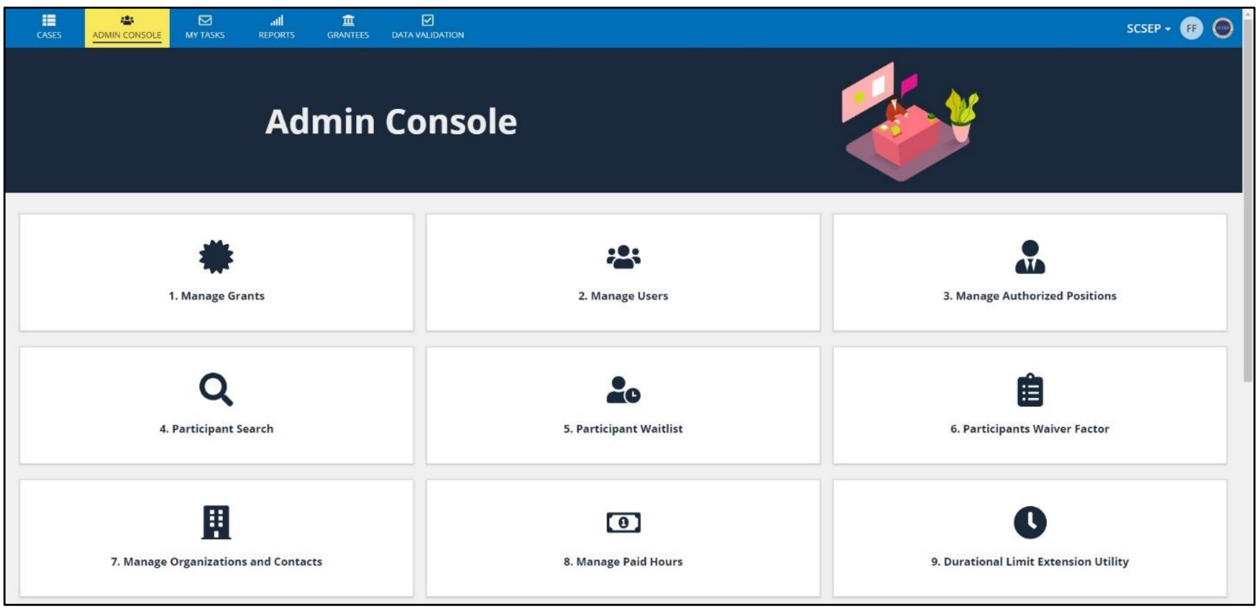


9. Click **Submit**.
10. On the *Reassign Cases* screen, select the **Case Assigned To** from the dropdown list.

11. Select the newly assigned case worker from the **Case Assigned To** dropdown list.
12. Click **Reassign** to assign all cases to the new assignee.

Admin Console

The Admin Console allows you to perform administrative functions related to SCSEP. The functions available to each user are role-dependent.



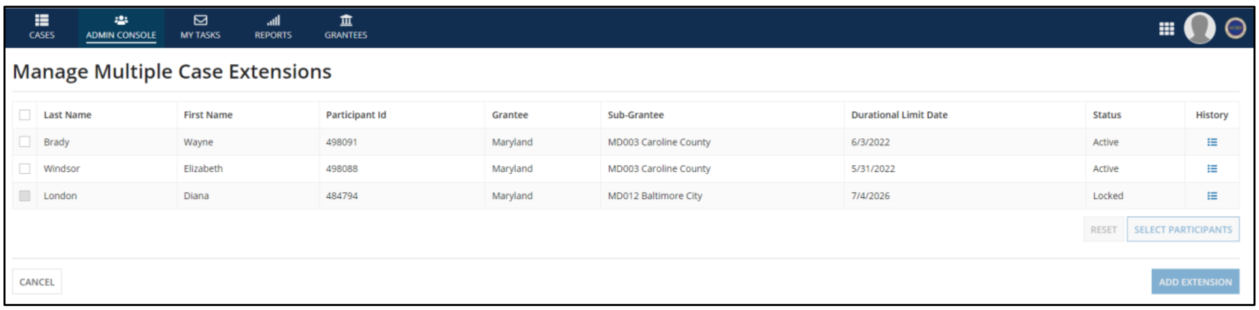
1. Durational Limit Extension Utility

Grantees whose individual durational limit (IDL) policy permits extensions for participants who are approaching their durational limit can add extensions for those participants.

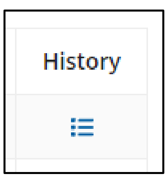
Only participants who qualify for an extension will be listed in the utility. Participants who are not yet eligible for an extension will not be listed in the utility. Refer to the **Data Collection Handbook** for information on determining qualification.

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

Grantee Administrators can add an extension:



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



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

Last Name	First Name	Participant Id
Brady	Wayne	498091
Windsor	Elizabeth	498088
London	Diana	484794

2. To add an extension for all participants, click the checkbox to the left of the **Last Name** heading. Note that the checkbox for a participant who is locked is grayed out and cannot be selected.

Last Name	First Name	Participant Id
Brady	Wayne	498091
Windsor	Elizabeth	498088
London	Diana	484794

3. Select one of the buttons on the screen to perform the next action.

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

RESET SELECT PARTICIPANTS

CANCEL ADD EXTENSION

4. Once at least one participant is selected, the **Reset** and **Select Participants** buttons will no longer be grayed out and can be clicked.
    a. Click **Reset** to clear all checkboxes.
    b. Click **Select Participants** to view the Certification of Extension Request.
    c. Click **Cancel** to return to the previous screen. Information entered in the fields on the screen is not saved.

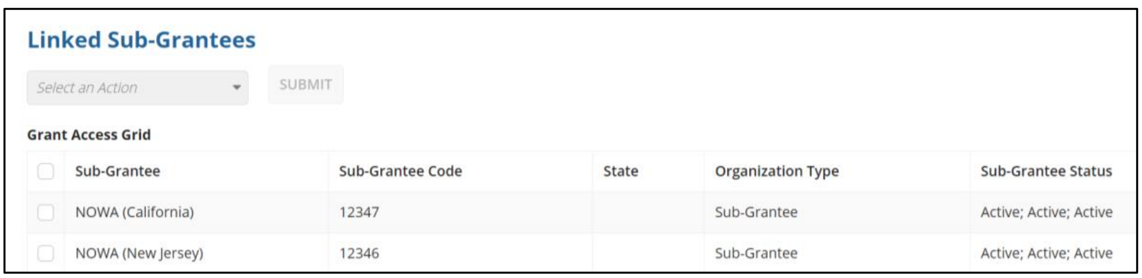
5. Check the **Certification of Extension Request** checkbox and enter the name of the approver.
6. Press **Enter** on the keyboard or click anywhere on the screen to activate the **Add Extension** button.
7. Click **Add Extension**. The text “Action Completed” will appear temporarily at the top of the screen and you will be 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.

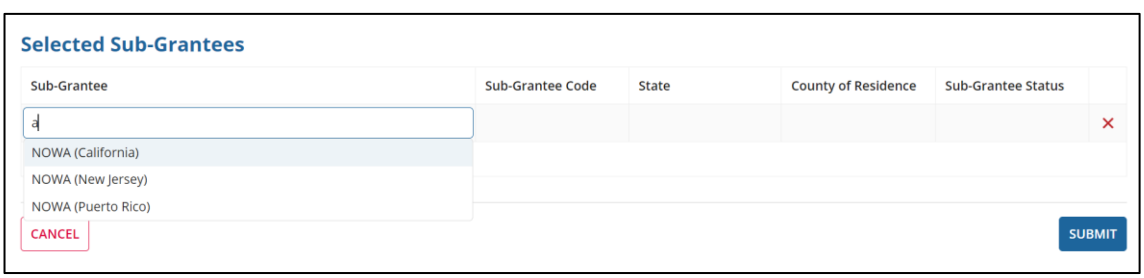
1. To find the grant to update, select the **Program Year** associated with the grant.
2. Click on the **Grant Number** hyperlink. The *Edit Grant* screen will appear.

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



2.1 Associate Sub-Grantees to Grant

1. To link a sub-grantee not listed in the **Grant Access Grid**, click **Add Sub-Grantee To Grant**. The *Add Sub-Grantees to Grant* screen will appear.
2. To search for a sub-grantee not currently linked, click **Add New** (⊕) under the **Selected Sub-Grantees** grid.
3. To display a list of sub-grantees, enter a value in the search box. Note that a partial search term can be entered. All sub-grantees that contain the search term entered will be listed.



4. Continue to click **Add New** (⊕) 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) ✕					✕

ADD NEW

5. Click on one of the buttons on the screen to perform the next action.
    a. The red **X** on the right-hand side of the grid removes the sub-grantee from the list.
    b. **Cancel** opens a pop-up window to confirm the cancellation.
        i. Click **No** to return to the screen.
        ii. Click **Yes** to end linking the sub-grantee(s) and return to the previous screen.

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

2.2 Remove Sub-Grantees from Grant

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

Grant Access Grid

Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
NOWA (California)	12347		Sub-Grantee	Active; Active; Active
NOWA (New Jersey)	12346		Sub-Grantee	Active; Active; Active

2. To remove all sub-grantees, click the checkbox to the left of the **Sub-Grantee** heading.
3. Under the **Linked Sub-Grantees** subheading, click the arrow on the **Select an Action** dropdown.
4. Click **Remove from Grant**. The **Submit** button is no longer grayed out and can be clicked.
5. Click **Submit**. A pop-up window opens to confirm submission.
    a. Click **No** to return to the screen. No sub-grantee(s) will be removed.
    b. Click **Yes** to remove the selected sub-grantee(s).

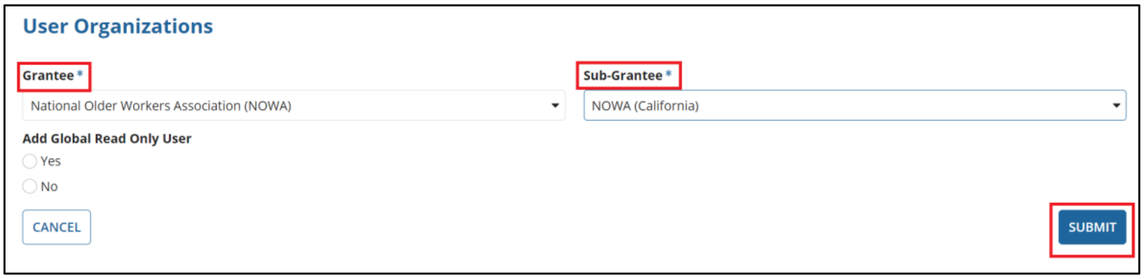
3. Manage Sub-Grantees

This section covers user management for sub-grantees.

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

3.1 Add User

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



2. Click **Submit**.
3. The *User Management* screen will appear. Select **Add User**.
4. Enter the information into the fields on the screen.
5. Acknowledge the agreement.
6. Click **Add User** to add the selected user to the sub-grantee.

3.2 Update User

1. To update users, select the **Grantee** and **Sub-Grantee**, and click **Submit**.
2. To update a user, select a user from the **Username** column of the displayed list.
3. Update the appropriate field values.
4. Acknowledge the agreement.
5. Select a value for **Relationship to SCSEP**.
6. Click **Update** to update the user.

3.3 Add Read Only User

1. To add a Read Only Global user, select *Yes* for **Add Global Read Only User**.
2. Click **Submit**.
3. Enter a value in the **Username** field to choose from the displayed list of users.
4. Select the **Role**.
5. Update the appropriate field values.
6. Select a value for **Relationship to SCSEP**.
7. Acknowledge the agreement.
8. Click **Add User** to add the selected user to the sub-grantee.

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

4. Manage Authorized Positions

The *Manage Authorized Positions* screen allows you 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 search box below the instructions or by locating the grantee organization in the table below the 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

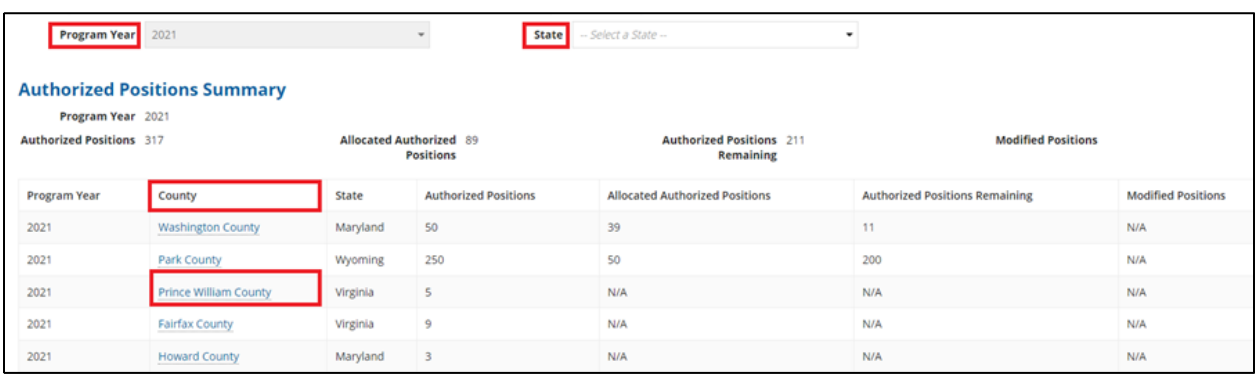
The **Submit** button will not be clickable until a grantee organization has been selected.

Click the linked **Organization Name** (grantee name). Two dropdowns 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 menus 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 sub-grantee
- **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

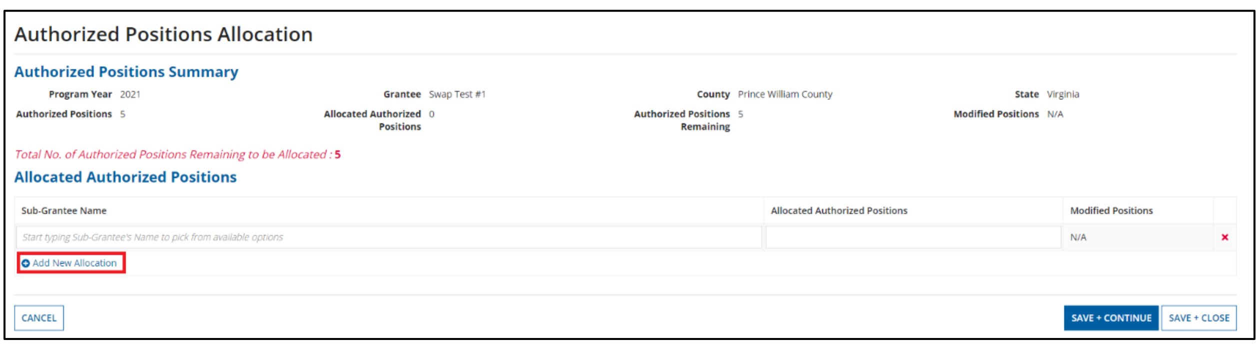


The authorized position information for each county associated with the selected state appears in a table below the **Authorized Position Summary**. The following fields appear in the table:

- **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 Positions Allocation* screen. A summary with the following fields is displayed:

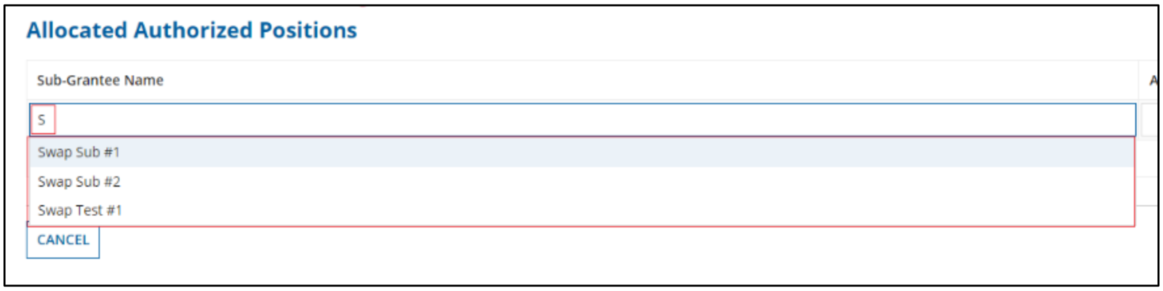
- **Program Year:** Displays the year selected
- **Grantee:** Displays the grantee name
- **County:** Displays the county name selected
- **State:** Displays the state selected
- **Authorized Positions:** Displays the number of authorized positions associated with the county
- **Allocated Authorized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



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

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

To allocate positions to a new sub-grantee, click **Add New Allocation**. A row will be added to the table where you can locate a sub-grantee using the search box in the **Sub-Grantee Name** field.

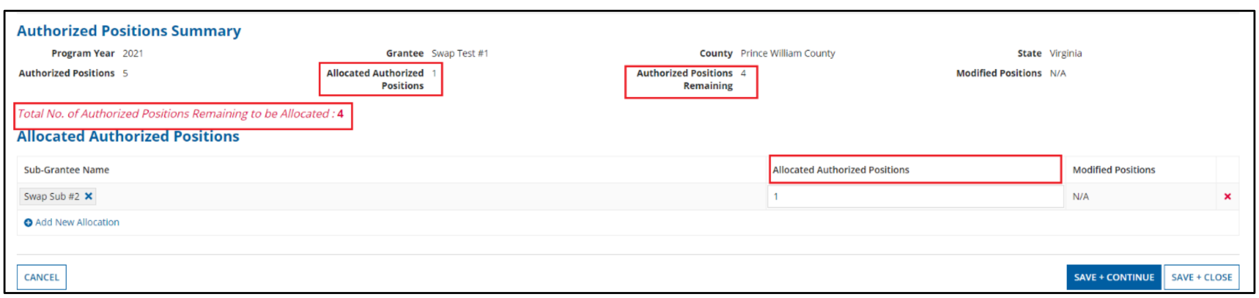


The following text appears above the table heading:

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

X equals the authorized positions minus the sum of allocated authorized positions for all sub-grantees.

- If the sum of the allocated authorized positions **equals** the authorized positions for the county, the text will be green.
- If the sum of the allocated authorized positions **is less than** the authorized positions, the text will appear red.



Clicking either **Save + Continue** or **Save + Close** displays a dialog box with the following text:

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

- Selecting *Yes* saves the record and navigates you to the *Authorized Position by County* screen.
- Selecting *No* returns you to the *Authorized Positions Allocation* screen without saving the record.

If the sum of the allocated authorized positions is greater than the authorized positions, the text will appear blue, and the following message appears at 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* screen allows you to generate an internal Quarterly Progress Report (QPR). The reports that are available depend on your access level and permissions, according to the following table:

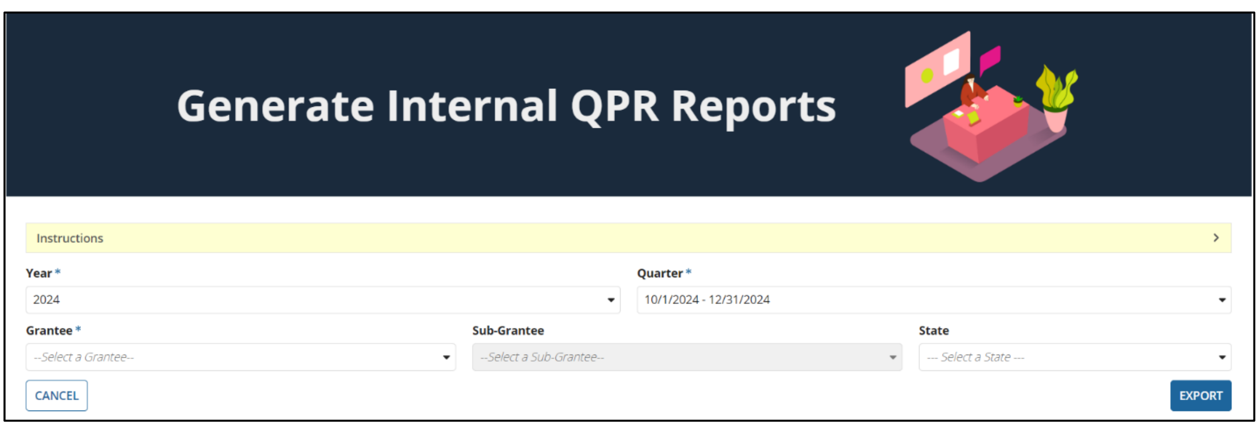
GPMS role	QPRs available to generate
Program Analyst & Read-only Global	All grantees and their sub-grantees/States
Grantee Administrator & Read-only Grant	Grantee specific to their access + all sub-grantees/States in that grant
Sub-Grantee Administrator, Supervisor, Case Manager	Only the specific sub-grantee(s) they have access to

The following instructions display below the banner in an expandable note:

> “Please select a reporting quarter and grantee in order to generate the internal QPR.”

The following dropdown lists will appear:

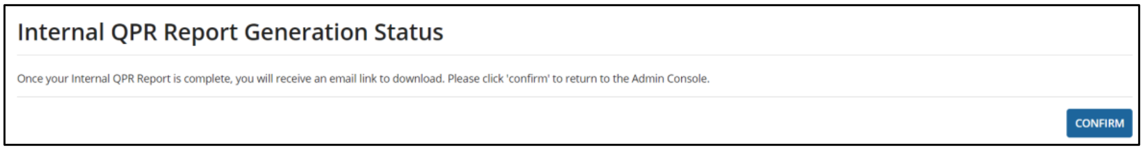
- **Year** (Required): Displays all years between 2016 and the current program year. This field defaults to the current program year.
- **Quarter** (Required): Displays the start and end date of each quarter available for the selected program year, including the End of Year period (all 4 quarters). This 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.



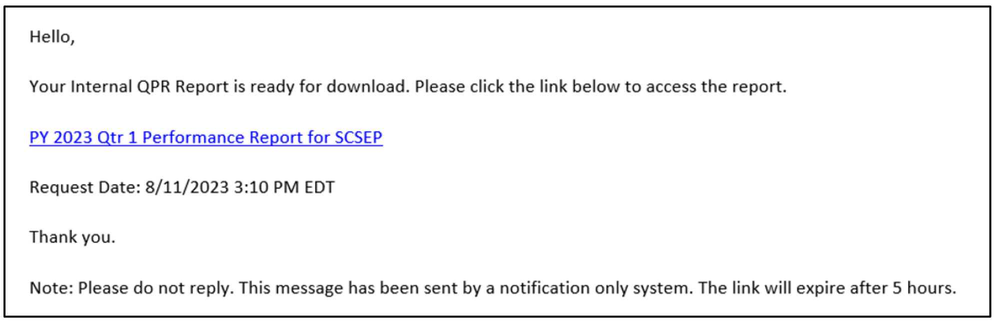
If the QPR has been frozen for a report period, you will not be able to select the frozen report period and generate the QPR for that report period on this screen.

1. Select **Admin Console** from the main navigation bar.
2. Click **Generate Internal QPR Reports**.

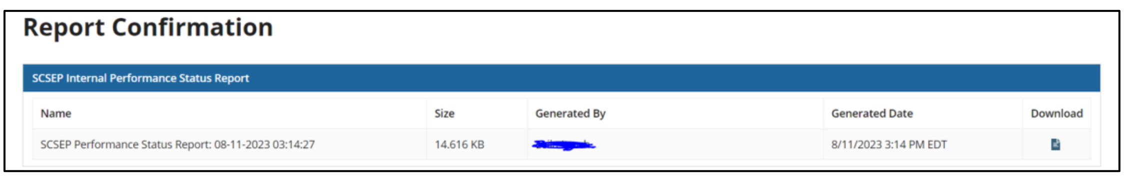
3. Select the required fields and click **Export**. The *Internal QPR Report Generation Status* screen will appear.



4. Click **Confirm** to return to the Admin Console. When the QPR is generated, you will receive an email with a link to retrieve the QPR.



5. Click the link in the email. The sign-in screen is displayed, and the user must sign in to the application again. The *Report Confirmation* screen will appear.



6. Click the download icon. The QPR will be downloaded, and you can open the downloaded file.

Users should be aware of the following notes when viewing the downloaded internal QPR:

- Grant Overview
  - Average Project Duration is calculated independently of a participant's duration that is attributed to the COVID-19 Duration Policy.
- Section A
- Section B
  - Measure B.2 Community Service Hours will display N/A for the L4Q reporting period.
- Section C
- Section D
  - The following measures will display 0% instead of N/A if the numerator is zero (0) and the denominator is not zero (0): measure D.2d Percentage of Placements in the

2nd and 4th Quarters with the Same Employer; and measure D.2f Percentage of Placements with Benefits.
    - Measure D.2b OJE Placement does not include self-employment placements.

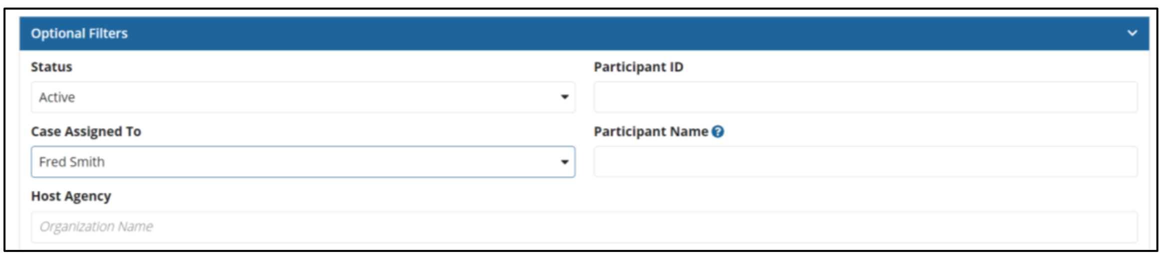
6. Manage Paid Hours

You can update the hours for multiple participants on the *Manage Paid Hours* screen. Once you select a program year that has not been frozen, all participants active within that program year will be displayed. 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.

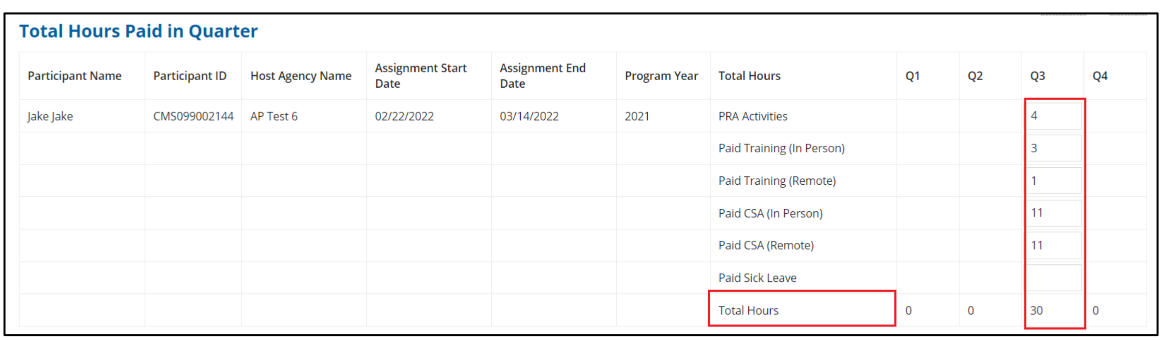
Paid hours for the previous program year can be entered or edited from the **Program Year** dropdown list. Refer to the **Data Collection Handbook** for definitions of each category of hours.

To enter hours for all active participants in a sub-grantee:

1. Select **Admin Console** from the main navigation bar.
2. Click **Manage Paid Hours**.
3. Select the **Grantee**, **Sub-Grantee**, and **Program Year** in the dropdown lists.
4. Note that the search can be further narrowed by using the **Optional Filters**.



5. Click **Search** to search for participants within the specified selections. Participants who meet the selection criteria will be displayed.
6. 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. If you enter paid hours exceeding 325 hours, a warning message will appear.



Total Hours Paid in Quarter

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

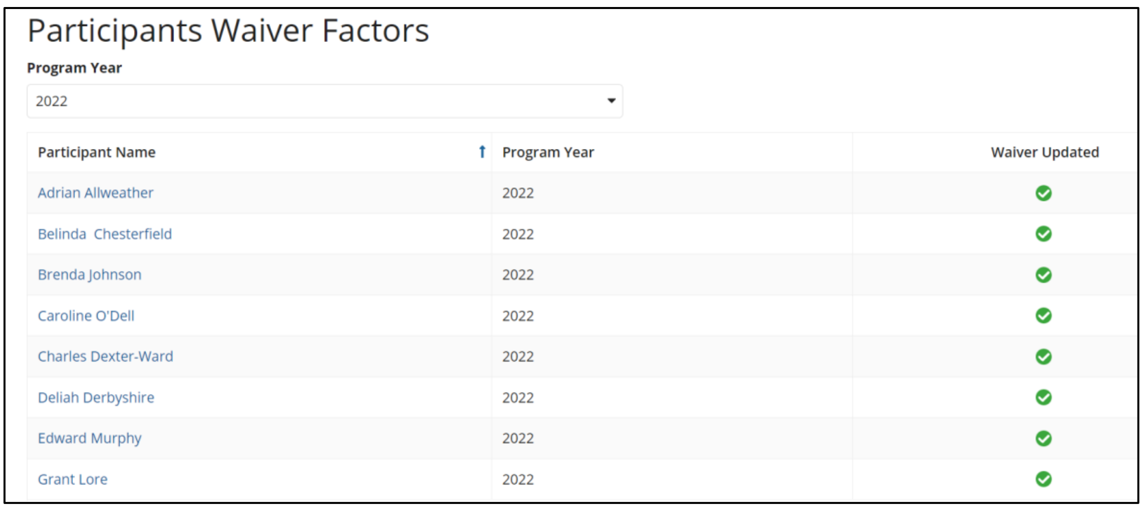
7. Click **Save** to save the entered data. If the **Save** button is grayed out and cannot be clicked, click anywhere on the screen to activate it.

After saving, you can navigate to additional screens of participants who meet the selection criteria and enter their hours.

7. Participants Waiver Factors

Participants' waiver factors can be accessed and managed from the Admin Console.

1. Select **Admin Console** from the main navigation bar.
2. Click **Participants Waiver Factors**.
3. Select a **Grantee** and **Sub-Grantee** from the dropdown lists.
4. Click **Submit** to view or edit a participant's waivers. A list of participants who have existing waiver factors will be displayed.



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

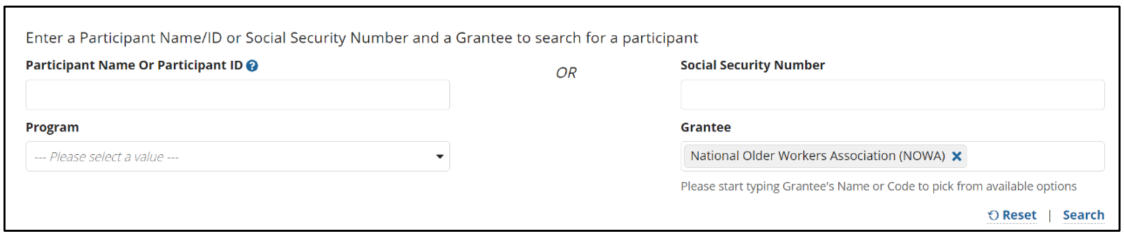
5. Note: Some participants have green check marks or red **X** marks under the **Waiver Updated** column.
   a. The green check mark indicates that this participant's waiver factors have been updated in their record.
   b. The red **X** indicates that the waivers have not been updated.
   c. Only active participants will be displayed.

6. Select a participant's name to edit the waiver factors for that participant. The participant's waiver factors for the selected program year will appear.
7. Edit the relevant **Waiver Factors** and the **Last Updated Date**.
8. Click **Save**.
9. If you have completed your updates, click **Close**.

8. Participant Search

To search for participants:

1. Select **Admin Console** from the main navigation bar.
2. Click **Participant Search**.
3. Enter a value in the **Grantee** field.
4. The **Participant Name Or Participant ID**, **Program**, or **Social Security Number** fields can also be entered to further filter the results.



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

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

6. Select the participant's name from the list to open the *Participant Summary* screen.
7. To search for another participant, click **Back to Search**.
8. If you have completed searching, click **Close**.

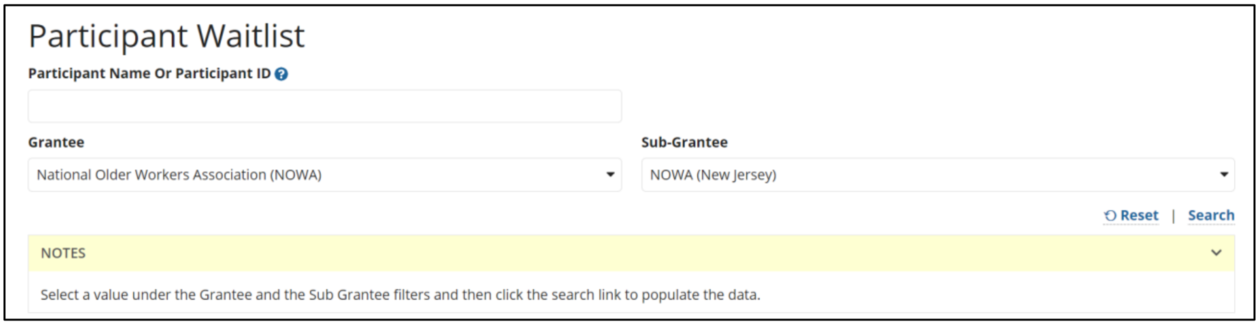
9. Participant Wait List

A Sub-Grantee or Grantee Administrator can search for participants currently on the waitlist using the *Participant Wait List* screen. You can search by participant ID, first name, last name, or full name.

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

The following message displays in an expandable note:

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

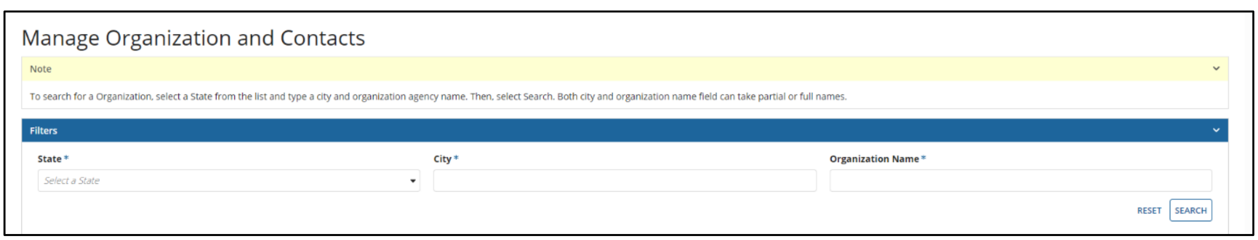


Once you click **Search**, the table below populates with all records associated with the selected grantee and sub-grantee that are currently assigned to the waitlist. The table includes the following columns:

- **Case ID**: The case ID is displayed as hyperlinked text. After clicking it, you will be redirected to the intake checklist for the case.
- **Participant Name**: The participant's first and last name
- **Participant ID**: The full participant ID
- **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

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* screen.



Notes about organizations:

- **Once an organization is created, some of its information cannot be updated.** This includes the 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:

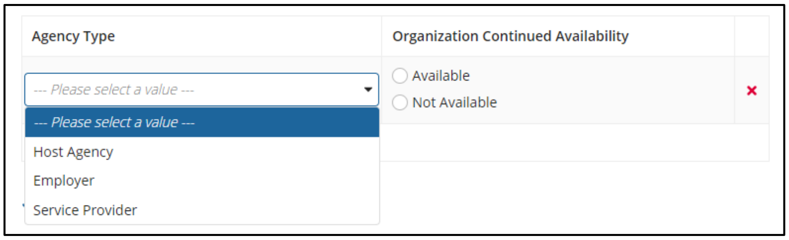
1. Select **Admin Console** from the main navigation bar.
2. Click **Manage Organizations and Contacts**.
3. Enter the information into the fields. Note: The entire **Organization Name** does not need to be entered. A minimum of one character can be entered. The results will display all organizations containing that character in the selected city and state.
4. Click **Search**. A list of results populates with organizations that match the search criteria.

10.2 Add an Organization

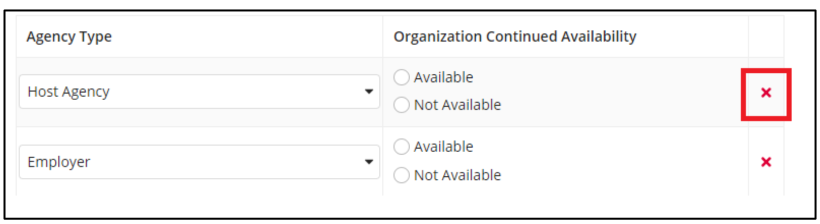
To add an organization:

1. Select **Admin Console** from the main navigation bar.
2. Click **Manage Organizations and Contacts**.
3. Conduct a search to determine if the organization is already in the system.
4. If the organization is not found in the search results, click **Add** to create a new organization.
5. Enter the name of the organization to be created.

6. Click anywhere on the screen to display further data entry fields.
7. Enter the information of the organization and of the primary contact.
8. 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 fields will appear.
    b. Click **Add New**.
    c. Select the **Agency Type** to which to designate and/or add additional details.



    d. Enter the information as necessary. If the organization is only designated as a host agency, employer, or service provider, no other fields in the **Additional Details** section need to be entered.
    e. If further designations or details are necessary, click **Add New** and select an **Agency Type**.
    f. To remove an agency type before the record is saved, click the red **X**.



    g. Note: Once the record is saved, the designated type cannot be removed. Contact SCSEP Help for assistance in updating the type.

9. Once all information has been entered, click **Add** to create the organization.

10.3 Edit an Organization

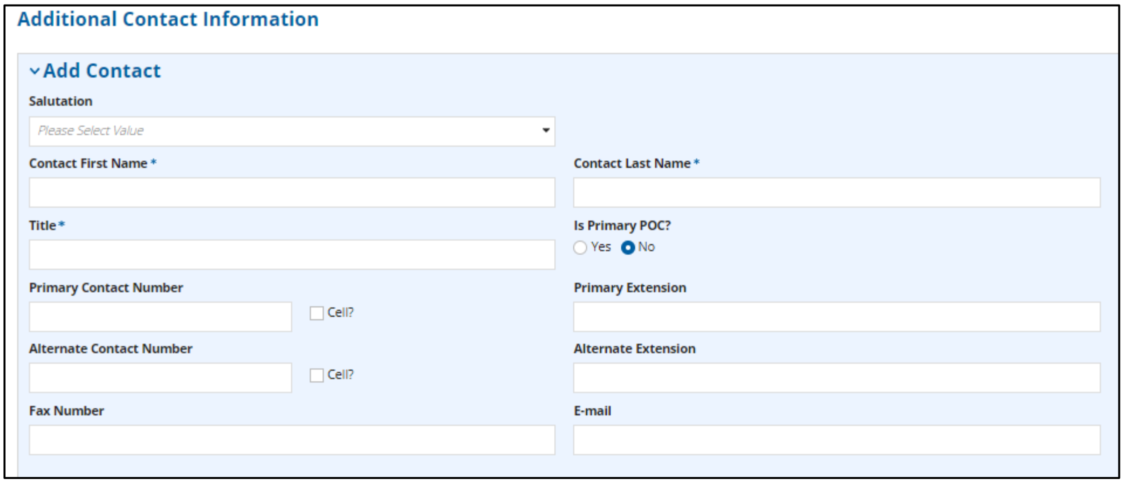
To edit an organization:

1. Select **Admin Console** from the main navigation bar.
2. Click **Manage Organizations and Contacts**.
3. Conduct a search to find the organization.
4. Click on the **Agency ID** of the organization requiring an edit.
5. Edit the necessary information.
6. Click **Save** to save the changes.

10.4 Add Additional Contacts

To add additional contacts to an organization:

1. Select **Admin Console** from the main navigation bar.
2. Click **Manage Organizations and Contacts**.
3. Conduct a search to find the organization.
4. Click on the **Agency ID** of the organization requiring additional contacts.
5. Click **Add** under *Additional Contact Information*.

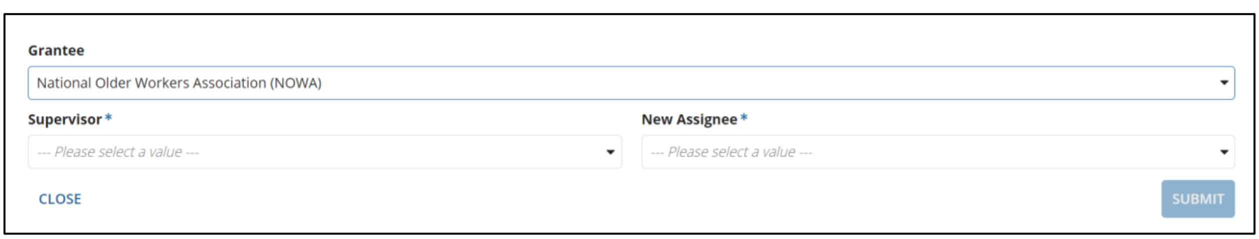


6. Enter the information into the fields.
7. Click **Save**. The additional contact is added to the organization.

11. Manage Eligibility Task Assignment

The *Manage Eligibility Task Assignment* screen 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.

When a grantee is selected from the **Grantee** dropdown list, the **Supervisor** and **New Assignee** dropdown lists appear.



- The **Supervisor** dropdown list is where the user selects the role they want to reassign tasks from.
- The **New Assignee** dropdown list is where the user selects the role they want to reassign tasks to.

Both lists include roles of Supervisor and above associated with the grantee. If you select the same person in both lists, the following message appears:

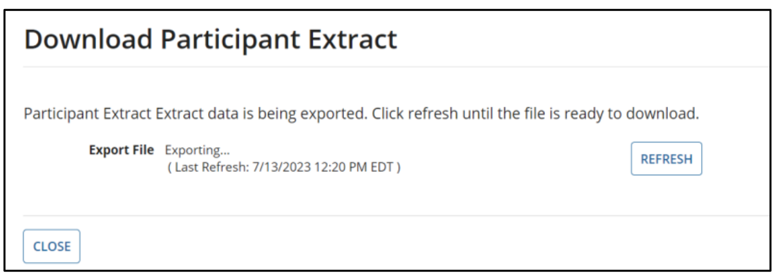
> "The new supervisor cannot be the same as the previous."

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.

1. Click **Extracts** in the Admin Console. The *Extracts Files* screen is displayed.
2. Enter the information into the fields. The **Grantee**, **Sub-Grantee** and **Extract Type** fields are required.
3. Click **Export**. A confirmation window appears: “Are you sure you want to leave?”
    a. Click **OK** to proceed with the export.
    b. Click **Cancel** to cancel the export.

4. The *Download [extract type chosen] Extract* screen will appear.
5. Click **Refresh** to see the latest status of the export.
6. The *Download [extract type chosen] Extract* screen will appear with a linked extract file.



7. Select the linked file name. The file is downloaded in .CSV format.

13. Nationwide QPR Report

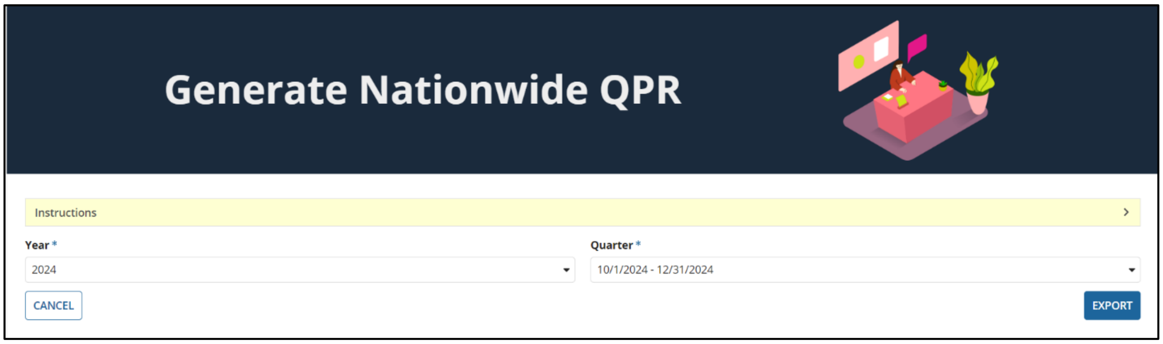
The *Nationwide QPR Reports* screen allows all users to generate the Nationwide Quarterly Progress Report (QPR).

On the *Nationwide QPR Reports* screen, the following dropdown lists appear:

- **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.

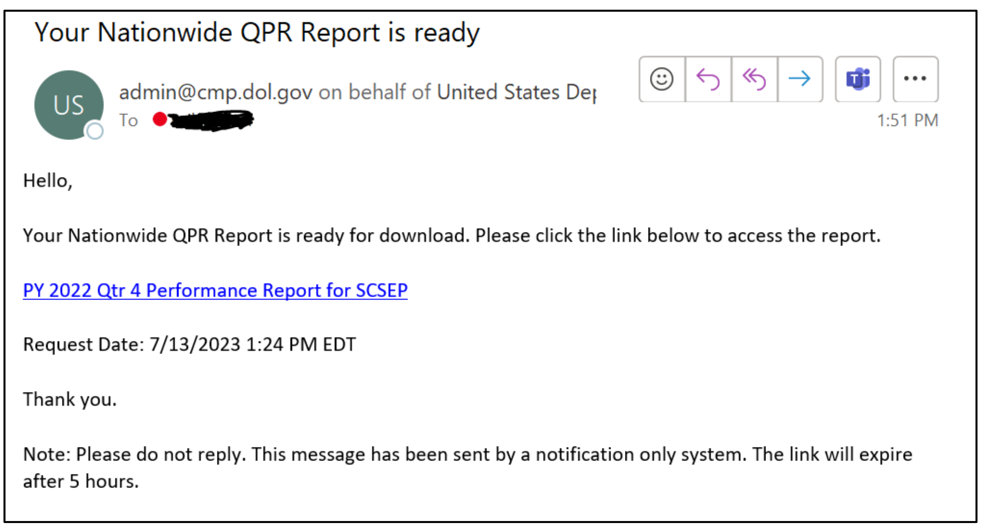
Follow these steps:

1. Select **Admin Console** from the main navigation bar.
2. Click **Nationwide QPR Report**.
3. Enter the information into the required fields.



4. Click **Export.** The *Nationwide QPR Report Generation Status* screen will appear with the following message: "Once your Nationwide QPR Report is complete, you will receive an email link to download. Please click 'confirm' to return to the Admin Console."

5. Click **Confirm** to return to the Admin Console. When the QPR is generated, you will receive an email with a link to retrieve the QPR.



6. Select the link in the email. The sign-in screen will appear, and you must sign in to the application again.
7. The *Report Confirmation* screen will appear.

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	

8. Click the download icon. The QPR will be downloaded, and you can open the downloaded file.

If the QPR has been frozen for a report period, you will not be able to select the frozen report period and generate the Nationwide QPR for that report period.

Please refer to the "Generate Internal QPR Reports" section of this document for notes about specific QPR measures.

14. Freeze QPR Report

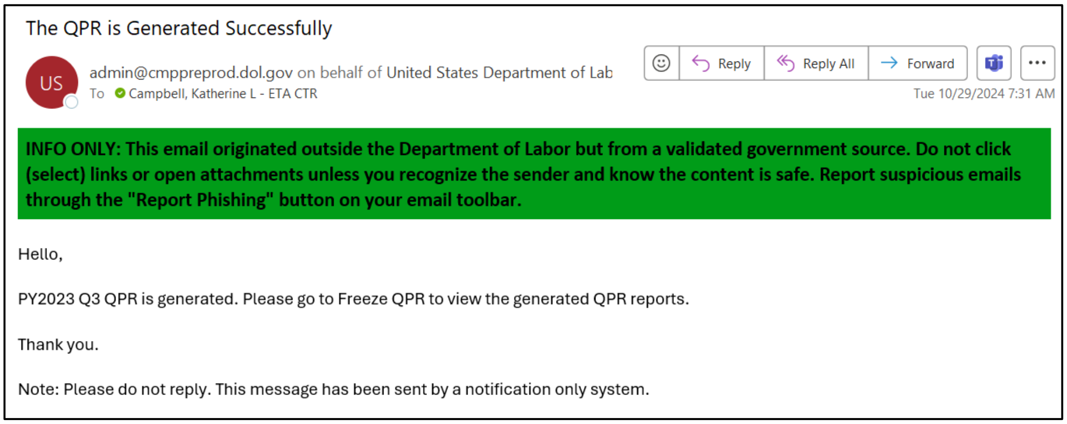
The *Freeze QPR* functionality is only available to users at the Program Analyst level.

1. Select **Admin Console** from the main navigation bar.
2. Click **Freeze QPR Report**.
3. Enter the information into the required fields.
    a. **Year** (Required): Displays all years between 2016 and the current program year. This field defaults to the current program year.
    b. **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 NULL.
    c. Note: You can only select a reporting period that has already concluded. The **Freeze QPR Report** button will be grayed out for reporting periods where the QPRs for that reporting period have not already been generated from the *Freeze QPR Report* screen.

4. Click **Generate**. This will initiate the process that generates the Nationwide QPR and the internal QPR for every grantee and sub-grantee combination for this reporting period.
5. A confirmation windows appears: "Begin QPR Generation? QPR Generation begins at 12:00 AM (EST). You will receive an email upon completion."
6. Click **Yes** to confirm and return to the Admin Console.

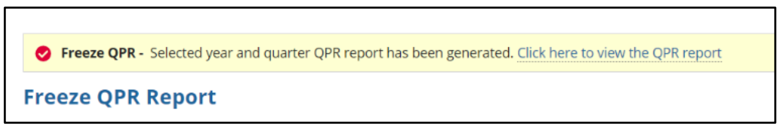
While the QPRs are generating, you will not be able to generate ad-hoc internal or Nationwide QPRs from the Admin Console. These cards will be grayed out during this process.

Upon completion of the QPR generation process, you will receive an email.

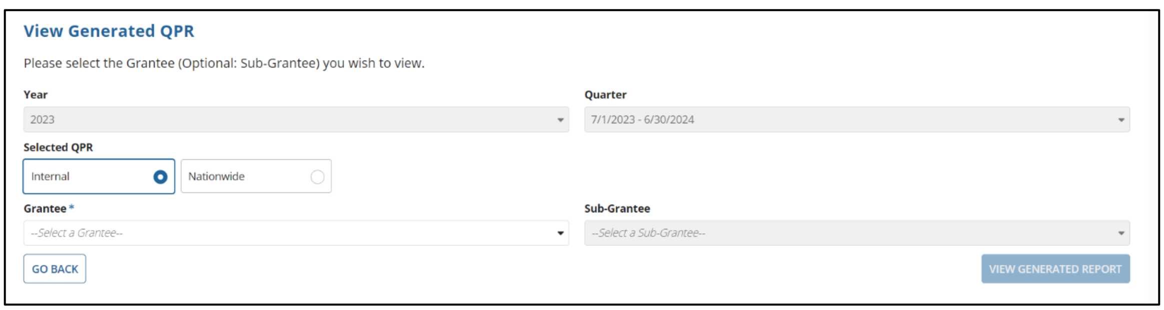


Once you receive this email:

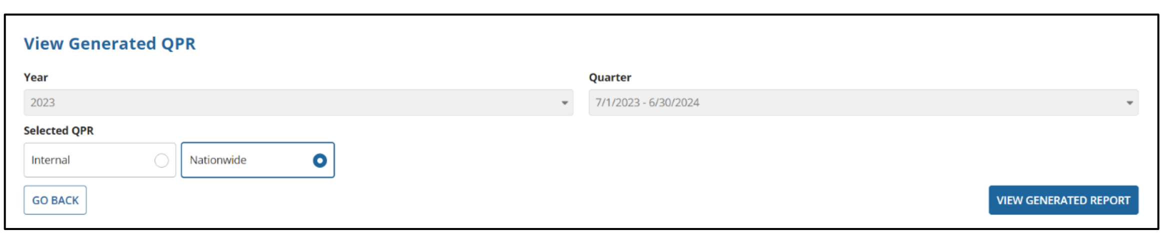
1. Return to the *Freeze QPR Reports* screen from the Admin Console.
2. A message is displayed at the top of the screen: "**Freeze QPR** - Selected year and quarter QPR report has been generated. Click here to view the QPR report."



3. Click on the link in the message. You can view any grantee and sub-grantee Internal QPR or Nationwide QPR for the generated reporting period, which is automatically populated in the **Year** and **Quarter** fields.

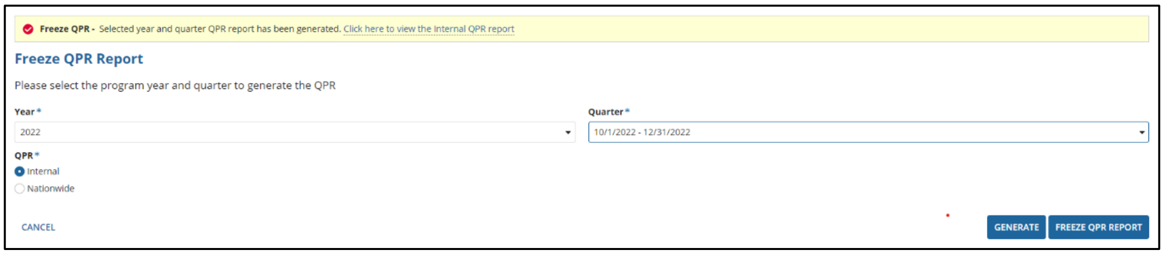


4. If *Nationwide* is chosen as the **Selected QPR**, no **Grantee** or **Sub-Grantee** fields will display.



5. Click **View Generated Report.** A message is displayed at the top of the screen: "**Freeze QPR -** QPR is ready for download. Click here to download the report."

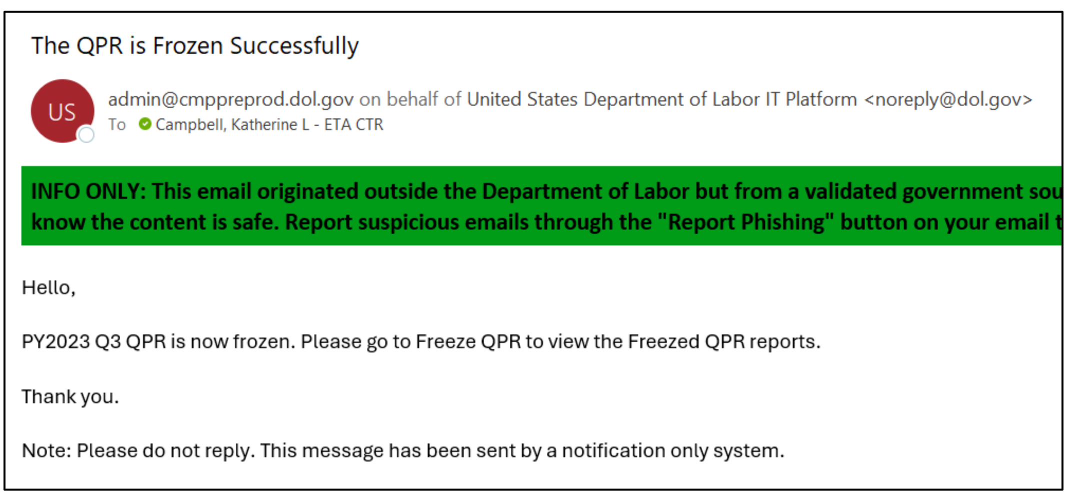
6. Click on the link in the message to download the report.
7. Return to the *Freeze QPR* screen from the Admin Console.
8. Select the same **Year** and **Quarter** fields. The **Freeze QPR Report** button is now enabled.



9. Click **Freeze QPR Report**. A confirmation message appears: "This will freeze the QPR. Are you sure?"
   a. Click **Yes** to confirm.
   b. Click **No** to cancel.

10. Click **Yes**. The QPR freezing process will begin, and you will return to the Admin Console.

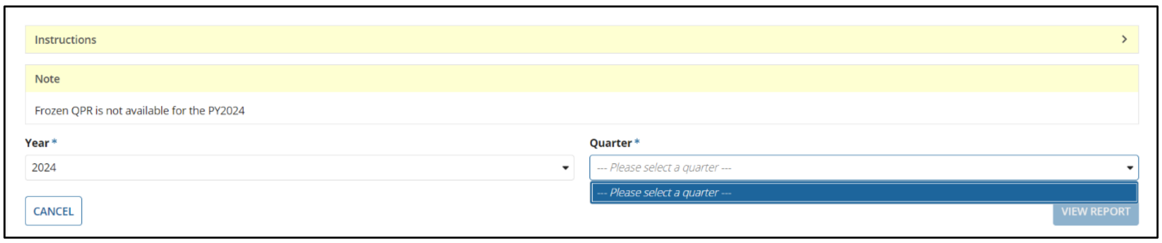
When the QPRs have been frozen and are ready for download, you will receive an email.



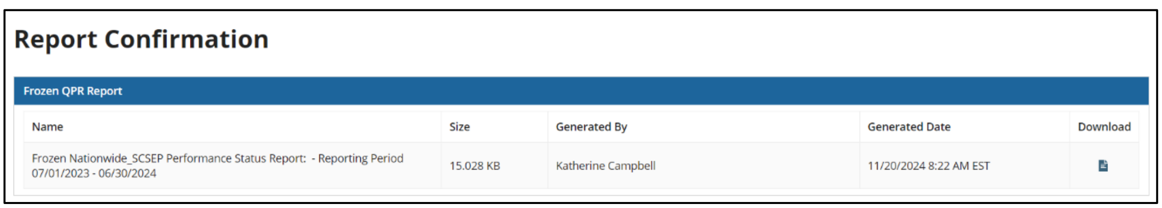
Once you receive this email:

1. Go to the *View Frozen QPR* screen from the Admin Console.
2. A message is displayed at the top of the screen: "Please select a reporting quarter and grantee and sub-grantee in order to view the frozen QPR."
3. You can only select a **Year** and **Quarter** to view a QPR that has already been frozen. Report periods that have not been generated and frozen will not appear in the dropdown list.

   In this case, a message will appear indicating that the frozen QPR is not available for that year or report period: "Frozen QPR is not available for the PY2024."



4. Select the **Year** and **Quarter** for which the QPRs were generated and frozen.
5. Select the type of QPR. For an Internal QPR, you must also select the **Grantee** (required) and **Sub-Grantee** (optional).
6. Click **View Report**. The *Report Confirmation* screen will appear.



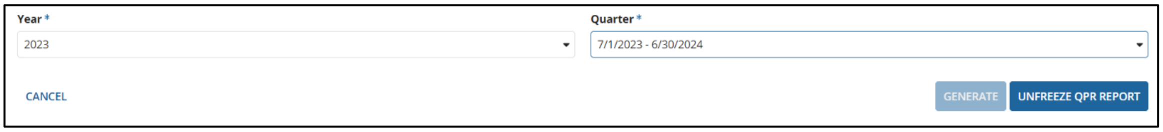
7. Click the download icon to download the recently frozen QPR for that reporting period and selected Nationwide or grantee/sub-grantee QPR.

14.1 Unfreeze QPR Report

Once the QPR has been frozen, no additional data collected in the GPMS will be reflected in any QPR for this reporting period.

If there is an error that must be corrected, Program Analysts can also unfreeze the QPR.

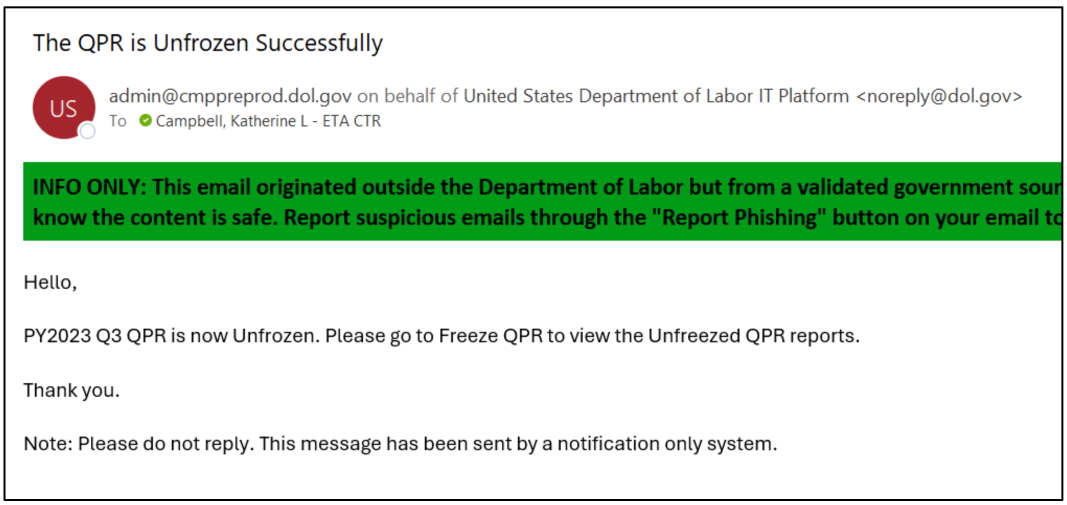
1. Select **Admin Console** from the main navigation bar.
2. Click **Freeze QPR Report**.
3. If you select a report period for **Year** and **Quarter** that has been frozen, the **Unfreeze QPR Report** button will appear and the **Generate** button will be grayed out.



4. Clicking **Unfreeze QPR Report** displays a confirmation window: "This will unfreeze the QPR. Are you sure?"
    a. Click **No** to cancel the request.
    b. Click **Yes** to proceed with unfreezing the QPR.

5. Click **Yes.**

You will receive an email when the QPR has been unfrozen.

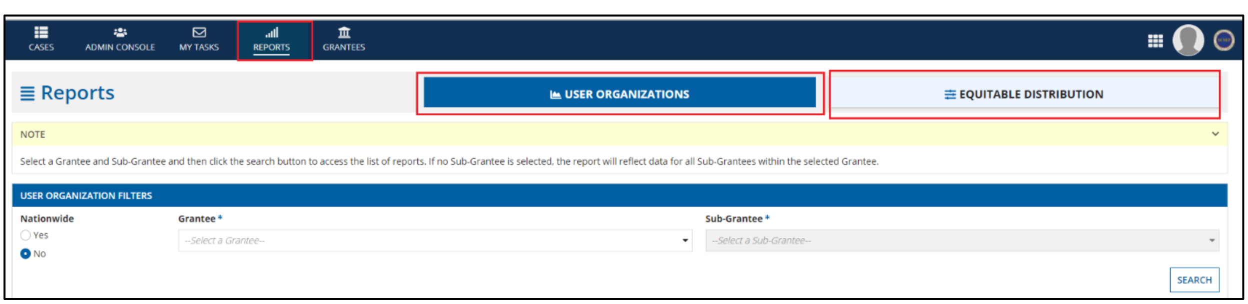


Now the QPR for the previously frozen report period will once again dynamically reflect real-time changes in the data collection system.

Reports

All reports related to SCSEP can be accessed in this section. Access to reports is dependent on user role (a full list by user role is presented below). The *Reports* screen contains two tabs:

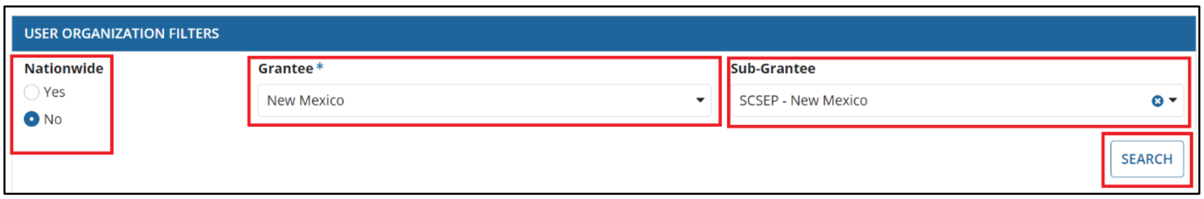
- User Organizations
- Equitable Distribution



1. User Organization

To access reports:

1. Select *Yes* under **Nationwide** for nationwide reports.
2. Select *No* under **Nationwide** to run individual grantee reports.
3. Select a grantee.
4. Select one or more sub-grantees. If no sub-grantee is selected, the reports will generate data for all sub-grantees within the selected grantee.
5. Click **Search**.

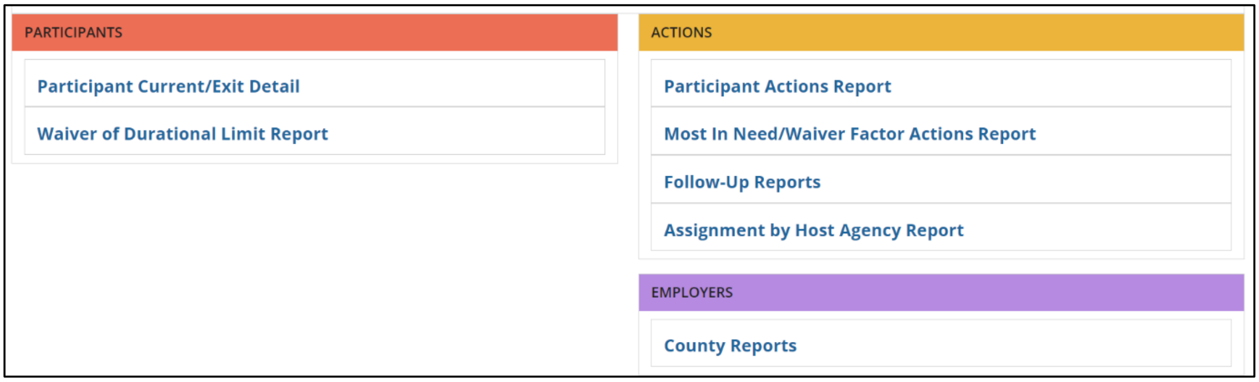


Depending on your user role, you will see reports categorized under **Participants**, **Actions**, and **Employers**.

Report Access by User Role

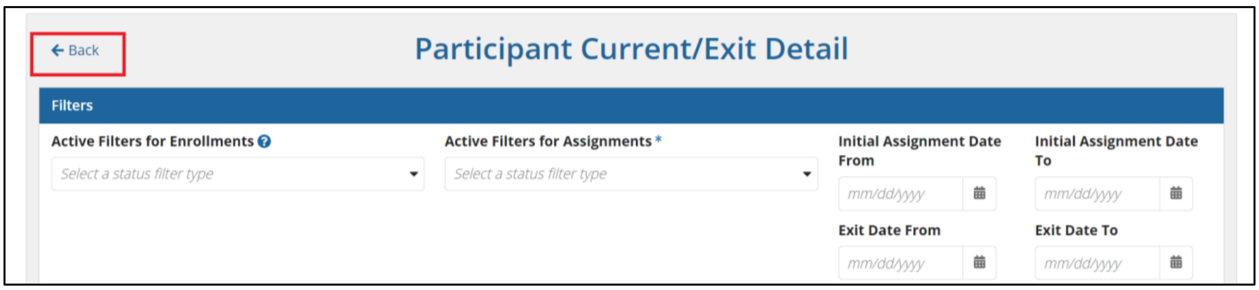
1. **Case Manager:**
    a. Participants: Participant Current/Exit Detail; Approved Breaks in Service; Durational Limit Extension; Waiver of Durational Limit Report; Participant Hours Report.
2. **Supervisor:**
    a. As above, for Case Manager for Participants.
3. **Sub-Grantee Admin:**
    a. As above, 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:

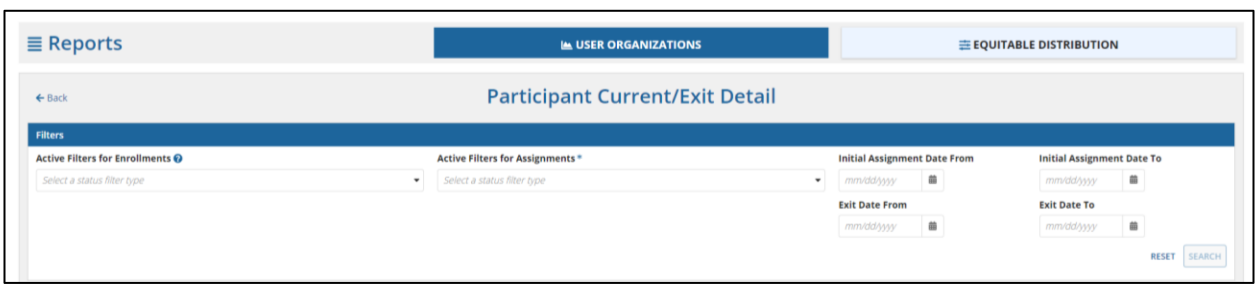


These reports will be described in the following sections. Remember that not all reports are available to every user.

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



1.1 Participant Current/Exit Detail

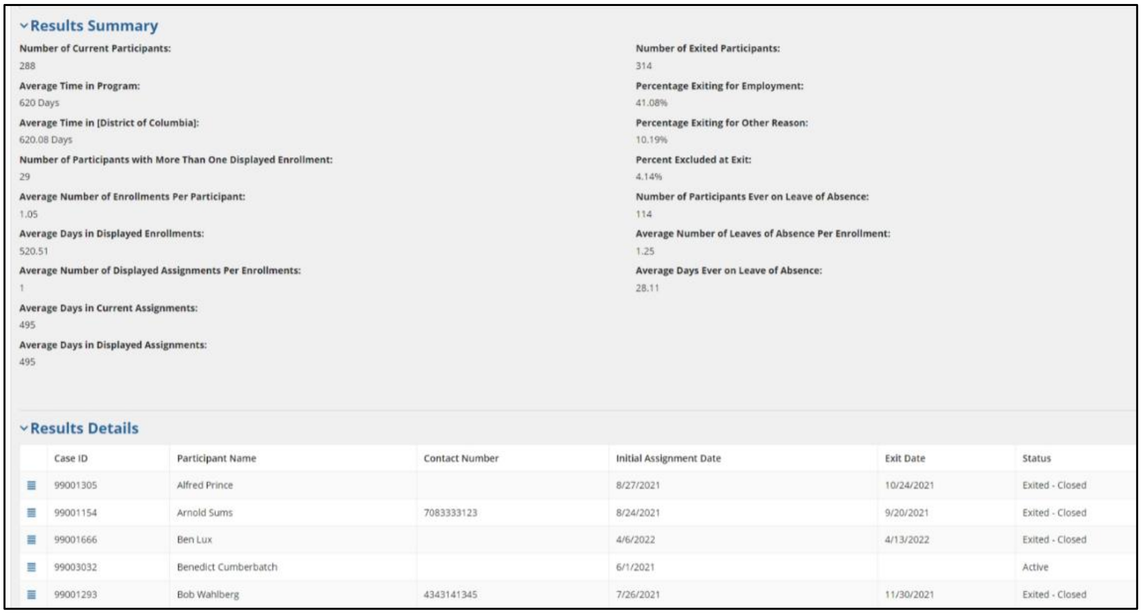


To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Participant Current/Exit Detail** from the *Participants* category.
4. This report can be filtered by the following:
    a. **Active Filters for Enrollments**: There are two choices: Show Currently Active Enrollments Only or Show Exited Enrollments Only. This is a required field.
    b. **Active Filters for Assignment**: There are two choices: Show Current/Latest Assignments Only or Show All Assignments.
    c. **Initial Assignment Date From**: Optional field to narrow your search.

d. **Initial Assignment Date To**: Optional field to narrow your search.
e. **Exit Date From**: Optional field to narrow your search.
f. **Exit Date To**: Optional field to narrow your search.

5. Click **Reset** to clear all filter values.
6. Choose the 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*.

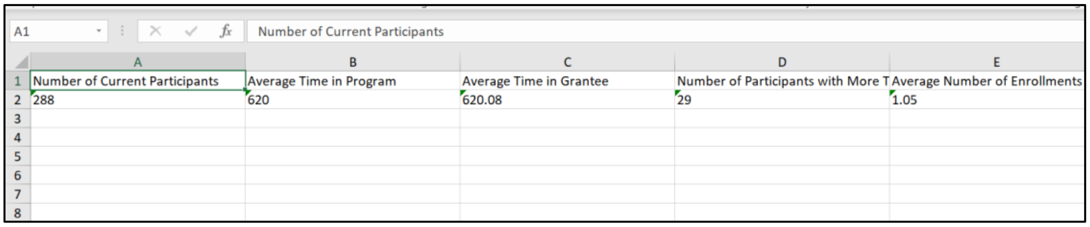


Case ID	Participant Name	Contact Number	Initial Assignment Date	Exit Date	Status
99001305	Alfred Prince		8/27/2021	10/24/2021	Exited - Closed
99001154	Arnold Sums	7083333123	8/24/2021	9/20/2021	Exited - Closed
99001666	Ben Lux		4/6/2022	4/13/2022	Exited - Closed
99003032	Benedict Cumberbatch		6/1/2021		Active
99001293	Bob Wahlberg	4343141345	7/26/2021	11/30/2021	Exited - Closed

7. **Average Time in Subgrantee** is displayed in the *Results Summary* when the sub-grantee is filtered. The **Average Time** shown on the screen may vary depending on selection criteria; the export file will provide **Average Time** information for both grantee and sub-grantee.

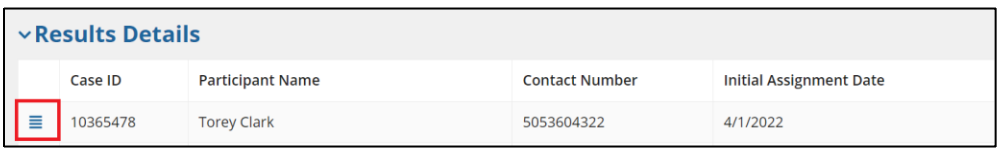
8. Click **Export** to export the *Results Summary* section of the report. Note that the report does not include duplicate assignments.

9. Click **Refresh** until a file name appears next to **Export File** on the screen.
10. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
11. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.



Results Details section: The individual participant's report can be viewed/exported in this section.

1. To view an individual participant's report, click 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).



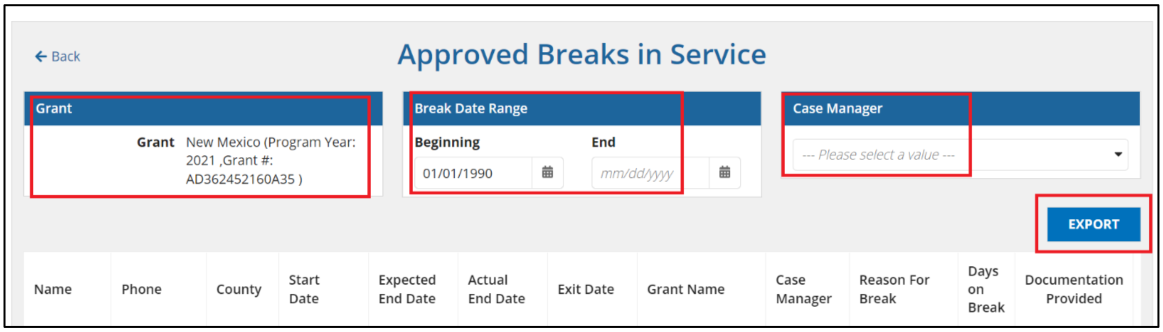
2. Click **Export**.
3. Click **Refresh** until a file name appears next to **Export File** on the screen.
4. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
5. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

Once you have generated the report, you can either exit the *Reports* screen entirely or generate more reports by clicking **Close**. Clicking **Close** on this screen (or any other report screen) will return you to the initial *Reports* screen.

1.2 Approved Breaks in Service (Future Report)

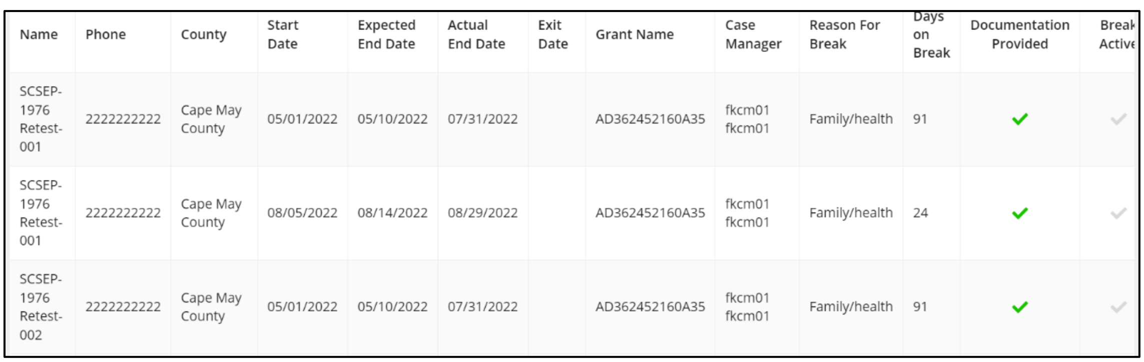
To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Approved Breaks in Service** from the *Participants* category.



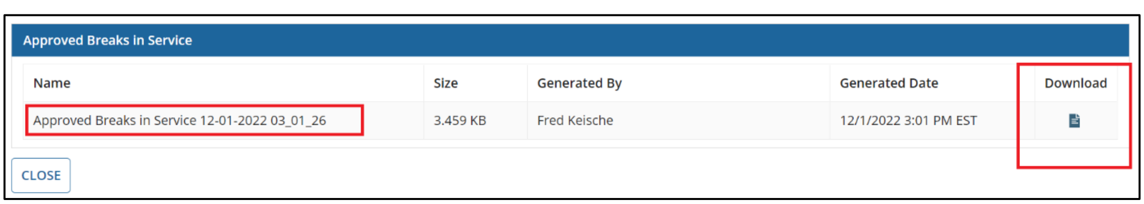
4. This report can be filtered by the following:
    a. **Grant**: This field is prefilled based on the combination of grantee and sub-grantee that you selected in the *User Organization Filters* screen.
    b. **Break Date Range**: Select a beginning date (required) and ending date (optional) to narrow the search. The beginning date is prefilled with 01/01/1990. A date can be entered by either typing it in using the MM/DD/YYYY format or by clicking the calendar icon and selecting the date.
    c. **Case Manager**: This field displays the Case Managers associated with the grantee/sub-grantee combination that you chose.

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



Name	Phone	County	Start Date	Expected End Date	Actual End Date	Exit Date	Grant Name	Case Manager	Reason For Break	Days on Break	Documentation Provided	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	✓	✓

6. The **Approved Breaks in Service** that are found by your filter selection can be exported by clicking **Export**.
7. When a file name appears on the *Report Confirmation* screen, click the download icon to save a copy of the file to your default file location.



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

	A	B	C	D	E	F	G	H	I	J	K	L
1	GRANTEE_	SUB_GRAI	LAST_NAMI	FIRST_NAME	PARTICIPA	HOME_PHONE_	BREAK_START_DATE	BREAK_EXPECTED_END_DATE	BREAK_END_DATE	BREAK_REASON	DAYS_ON_APPROVED_BREAK	APPLICATI
2	690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
3	690	NM001	Retest-001	SCSEP-1976	10003884	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
4	690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	########
5	690	NM001	Retest-002	SCSEP-1976	10003885	2222222222	8/4/2022	8/14/2022	8/29/2022	Family/health	25	########
6	690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022
7	690	NM001	Retest-003	SCSEP-1976	10003887	2222222222	8/5/2022	8/14/2022	8/29/2022	Family/health	24	1/1/2022
8	690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	########
9	690	NM001	Retest-004	SCSEP-1976	10003893	2222222222	8/4/2022	8/14/2022		Family/health	120	########
10	690	NM001	Retest-006	SCSEP-1976	10004228	2222222222	5/1/2022	5/10/2022	7/31/2022	Family/health	91	1/1/2022

1.4 Waiver of Durational Limit Report

The Waiver of Durational Limit report is generated based on the combination of grantee and sub-grantee that you selected. In cases of multiple enrollments, the report displays the latest enrollment. 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.

Waiver of Durational Limit Report

NOTE

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

Results Summary

Durational Limit for all Active Participants: 4

Total Participants 396 days From Durational Limit: 0

Participants within 30 days of Durational Limit: 0

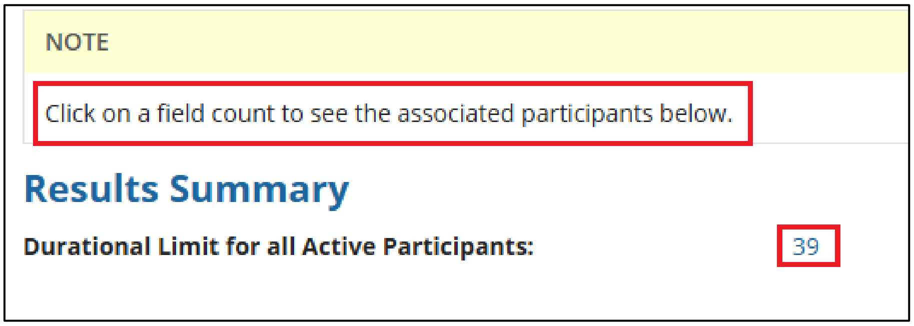
Total Participants 396 days From Durational Limit with at Least One Waiver Updated This Program Year: 0

Participants within 30 days of Durational Limit with at Least One Waiver Updated This Program Year: 0

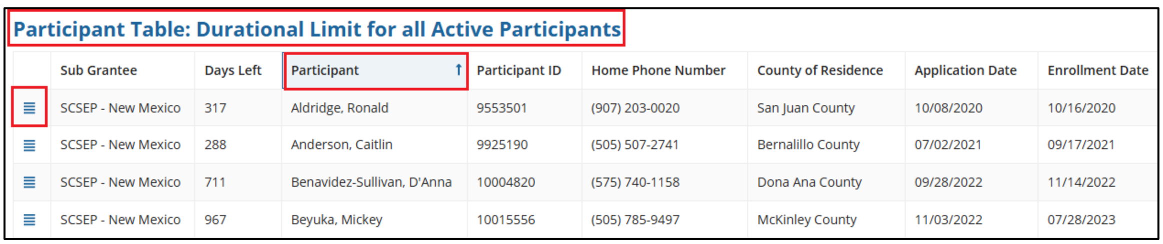
To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Waiver of Durational Limit Report** from the *Participants* category.
4. The aggregated results of this report can be exported by clicking **Export**.
    a. Click **Refresh** until a file name appears next to **Export File**.
    b. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
    c. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

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



6. Participants for your selected grantee and sub-grantee combination that fit the metric will be displayed in the **Participant Table**. You can sort the table by clicking on a column name (e.g., *Participant*).



Participant Table: Durational Limit for all Active Participants

	Sub Grantee	Days Left	Participant	Participant ID	Home Phone Number	County of Residence	Application Date	Enrollment Date
≡	SCSEP - New Mexico	317	Aldridge, Ronald	9553501	(907) 203-0020	San Juan County	10/08/2020	10/16/2020
≡	SCSEP - New Mexico	288	Anderson, Caitlin	9925190	(505) 507-2741	Bernalillo County	07/02/2021	09/17/2021
≡	SCSEP - New Mexico	711	Benavidez-Sullivan, D'Anna	10004820	(575) 740-1158	Dona Ana County	09/28/2022	11/14/2022
≡	SCSEP - New Mexico	967	Beyuka, Mickey	10015556	(505) 785-9497	McKinley County	11/03/2022	07/28/2023

a. Click **Export**.
b. Click **Refresh** until a file name appears next to **Export File** on the screen.
c. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
d. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

7. Click the icon to the left of a row to generate a **Participant Details** report.

Participant Details

Case Assigned To
Smith, Mary
Age
70
Date of Birth
12/26/1952
Gender
Male
Address
508 Becker Ave. Belen New Mexico 87002
Email
slvr58ddy@gmail.com
Disability
No
Veteran Status
No

Race, American Indian or Alaskan Native
Participant did not self-identify
Race, Asian
Participant did not self-identify
Race, Black, African American
Participant did not self-identify
Race, Native Hawaiian/Pacific Islander
Participant did not self-identify
Race, White
Yes
Ethnicity: Hispanic, Latino, or Spanish Origin?
No
Has Enrollments In Other Grantees
None

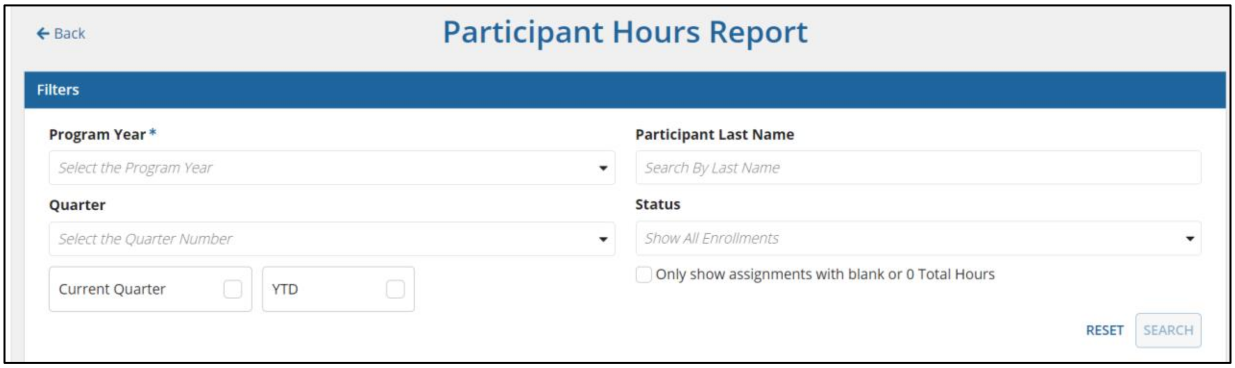
Waiver Factors

Severe Disability
Frail
Old Enough, Not Receiving SS Title II
Severly Ltd Emp Prospects

Limited English Proficiency
Low Literacy Skills
75 or Older
No
Formerly Incarcerated

   a. Click **Export**.
   b. Click **Refresh** until a file name appears next to **Export File** on the screen.
   c. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
   d. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

1.6 Participant Hours Report



To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Participant Hours Report** from the *Participants* category.
4. This report can be filtered by the following:
   a. **Program Year (required)**: You can select individual years from 2021 to the current year.
   b. **Status**:
      i. Select *Active* in the **Status** field to view hours for currently active participants.
      ii. Select *Exited* to view hours for currently exited participants.
      iii. To view all participants and their associated paid hours for previous quarters, leave the **Status** field unselected. Note: Exit dates shown may be later than the report period selected.
   c. **Participant Last Name**: Enter all or part of a last name to filter on this field.
   d. **Quarter**: Select 1-4 for the first through fourth quarter of a program year.
   e. **Current Quarter or YTD**: If *Current Quarter* is selected, the **Program Year** and **Quarter** will default to the current quarter. If *YTD* is selected, **Program Year** will default to the current year and the **Quarter** field will be disabled.
   f. **Only show assignments with blank or 0 Total Hours**: If this box is checked, results will only include assignments that have zero or blank total hours for the program year/quarter selected.

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

6. Choose the desired filters and click **Search**.

Grantee Summary Details

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

7. If the search returns a total participant count greater than 1000, results will be limited and a warning message will be displayed under the **Grantee Summary Details** table: "Warning: The total participants count on this report is greater than 1000. Please include additional filter criteria to limit the result."
8. The screen will display aggregate results for the grantee/sub-grantee(s) you have chosen and display them under **Grantee Summary Details**, the **Grantee Summary Hours Table**, and in the **Case Summary Table**.

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

9. The **Grantee Summary Hours Table** will show totals by quarter for various categories: Total PRA Activities Hours, Total Paid In-Person CSA Hours, etc.
    a. Click **Export**.
    b. Click **Refresh** until a file name appears next to **Export File** on the screen.

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

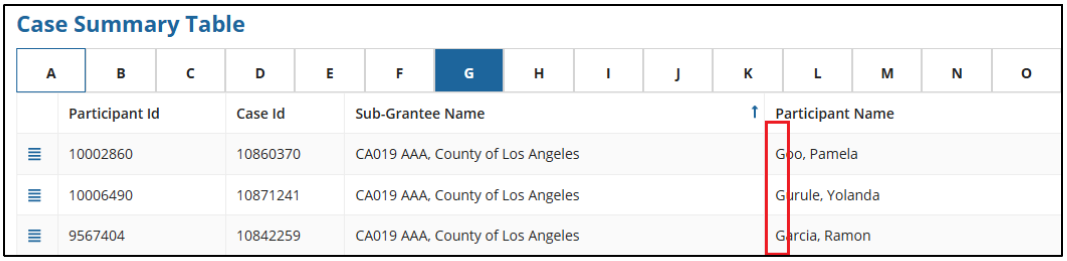
Export File Exporting...
(Last Refresh: 12/5/2022 12:24 PM EST)

REFRESH

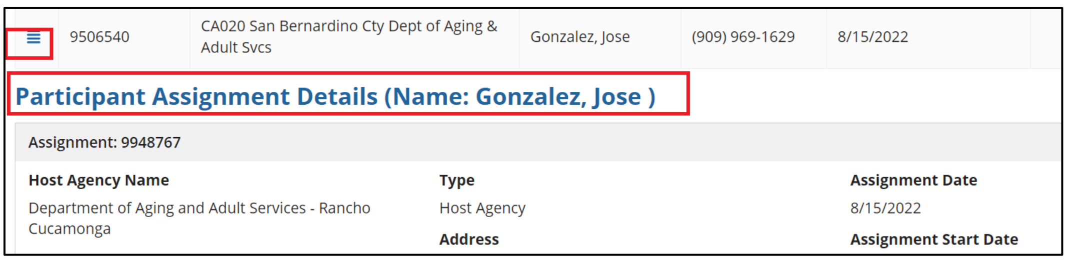
    c. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
    d. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

10. The **Case Summary Table** shows information by individual participant.
    a. If multiple sub-grantees were selected in the initial report filter, the sub-grantee name will be shown in the table for each case.

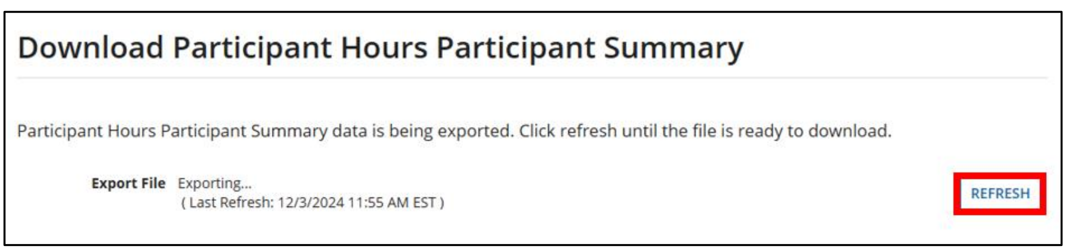
b. All columns can be clicked to sort by that column in ascending/descending order.
c. To view only participants with a last name that starts with a single letter, click that letter in the alphabet row above the columns.



11. Click **Export**.
12. To view an individual participant's report, click 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).



a. Click **Export**.
b. Click **Refresh** until a file name appears next to **Export File**.



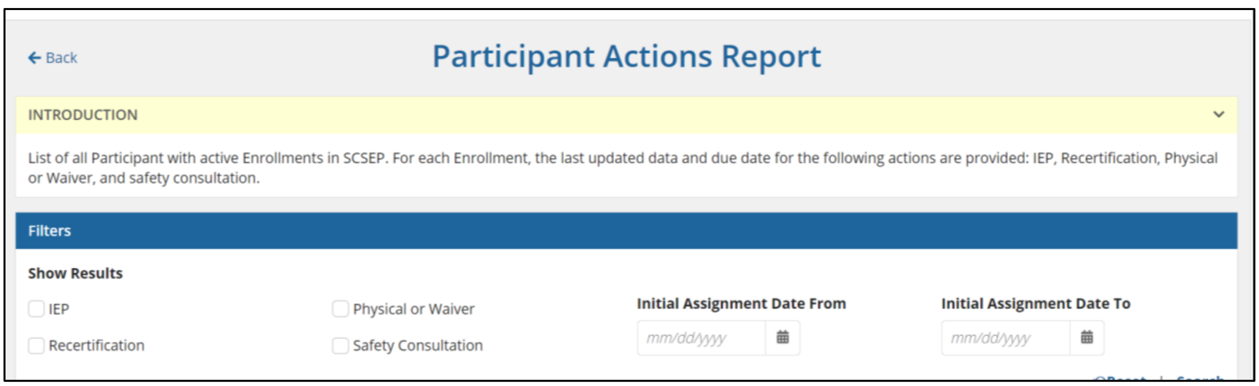
c. Click on the name or right-click on the file name to download a copy of the file to your default file location.

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

2. Actions

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

2.1 Participant Actions Report



To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Participant Actions Report** from the *Actions* category.
4. This report can be filtered by the following:
   a. **Show Results**: Choose none or any combination of four for IEP, Recertification, Physical or Waiver and Safety Consultation.
   b. **Initial Assignment Date From**: Optional field to narrow your search.
   c. **Initial Assignment Date To**: Optional field to narrow your search.

   There are no required filters for this report.

5. Clicking **Reset** will clear the values for the filters.
6. Choose filters and click **Search**. The screen will show aggregate results based on the filters you selected.

7. Click **Export**.
8. When a file name appears on the *Report Confirmation* screen, click the download icon to save a copy of the file to your default file location.

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	

9. 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**, replicating the report as seen on the screen.

	A	B	C
1	Number of Enrollment	205	
2	Number of Actions Pending	156	
3	Number of Actions Past Due	664	
4	Number of IEPs Pending	4	
5	Number of IEPs Past Due	201	
6	Number of Recertifications Pend	52	
7	Number of Recertifications Past_	153	
8	Number of Physicals or Waivers	50	
9	Number of Physicals or Waivers	155	
10	Number of Safety Consultations	50	
11	Number of safety consultation p	155	
12			
13			
14			
15			
16			
17			
18			
19			

Summary | Details

10. The bottom of the screen shows individual participants. These can be sorted by column:

Detail Section

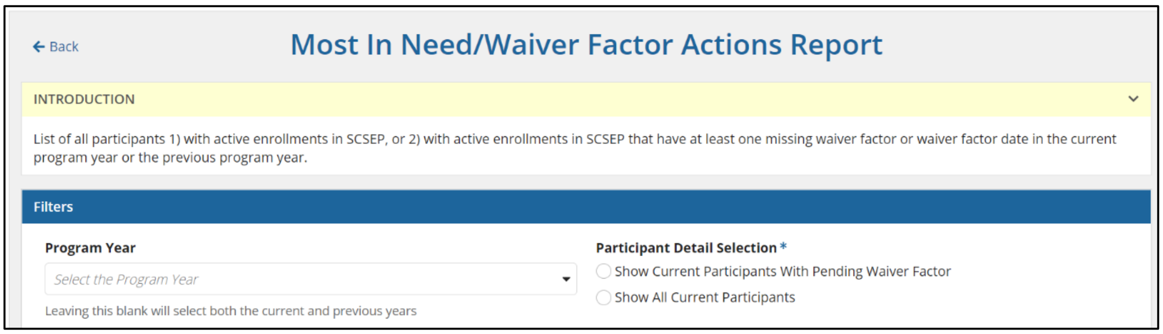
A B C D E F G H I J K L M N O P Q R S T U V W X Y

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

a. Participant
b. Initial Assignment Date
c. Date of Last IEP
d. Date of Next IEP

e. Date of Recertification (In the Participant Actions Report, the pending recertification is blank in the Date of Recertification column until the Supervisor approves it.)
f. Date of Next Recertification
g. Date of Last Physical or Waiver
h. Date of Next Physical or Waiver
i. Assignment Date
j. Date of Safety Consultation
k. Host Agency

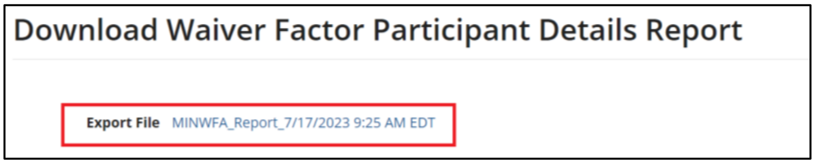
2.2 Most in Need/Waiver Factor Actions Report



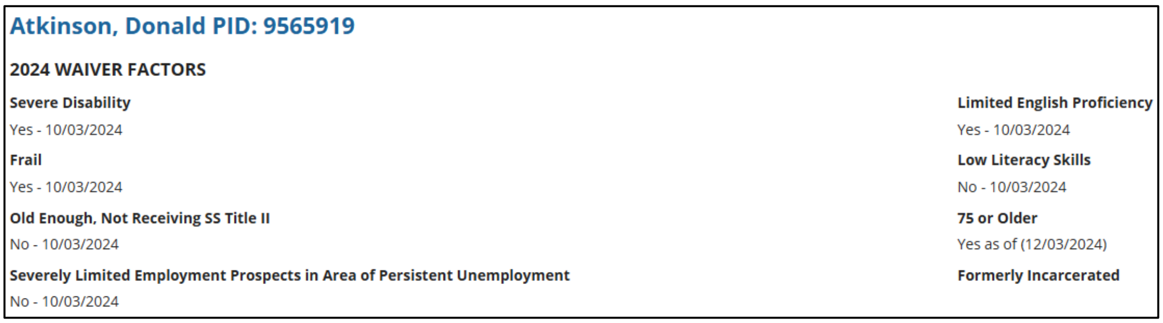
To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Most in Need/Waiver Factor Actions** from the *Actions* category.
4. This report can be filtered by the following:
   a. **Program Year**: Select one of the two program years available (current year and previous year). Leaving this blank will select both the current and previous year.
   b. **Participant Detail Selection**: You can select either to show *Current Participants With Pending Waiver Factors* or *All Current Participants*. This is a required field.

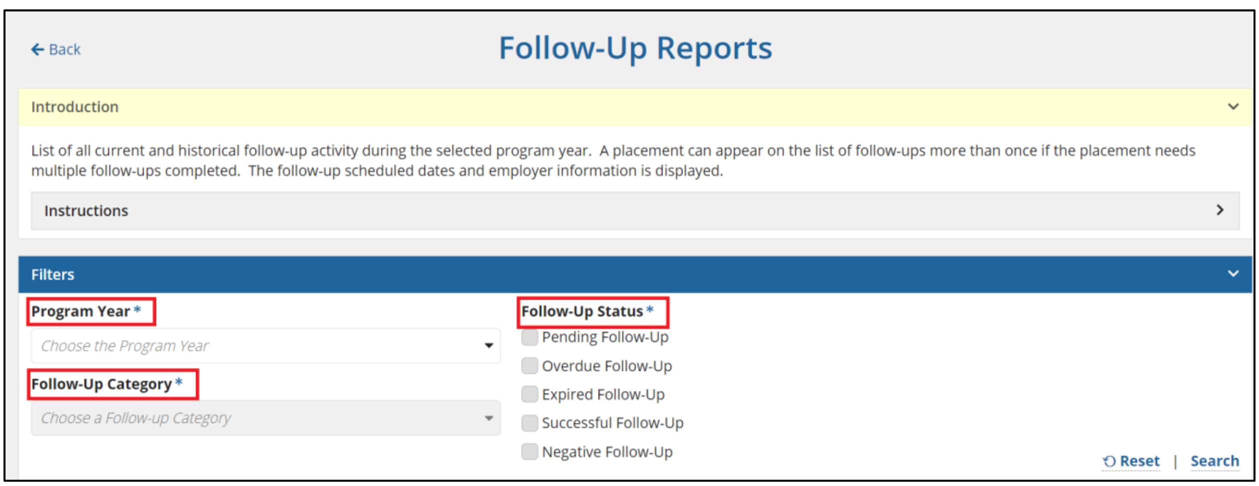
5. Clicking **Reset** will clear the values for the filters.
6. Choose filters and click **Search**. The screen will show aggregate results based on the filters you selected.
7. The screen will display aggregate results for the grantee/sub-grantee you have chosen and display them under *Results Summary*.
8. Click **Export**.
9. Click **Refresh** until a file name appears next to **Export File** on the screen.
10. Click on the file name or right-click on the file name to download a copy of the file to your default file location.



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



2.3 Follow-Up Reports

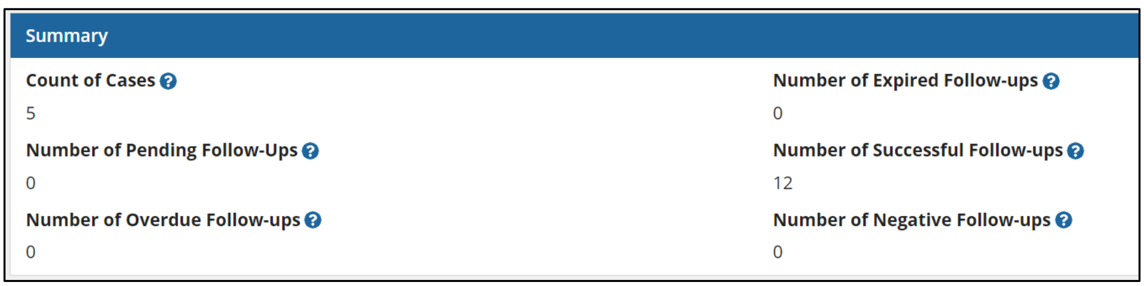


To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Follow-Up Reports** from the *Actions* category.
4. This report has three required filters. Each of these must be selected, in turn, to allow you to select from the next filter, and then to generate a report:

   a. **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 to make the next filter selection.
   b. **Follow-Up Category**: Filter your results on Follow-Up 1, Follow-Up 2, Follow-Up 3 or all three follow-ups (*1, 2, 3*, and *All*). You must select a choice to move on to the next filter selection.
   c. **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. More than one status, or even all statuses, can be selected.

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



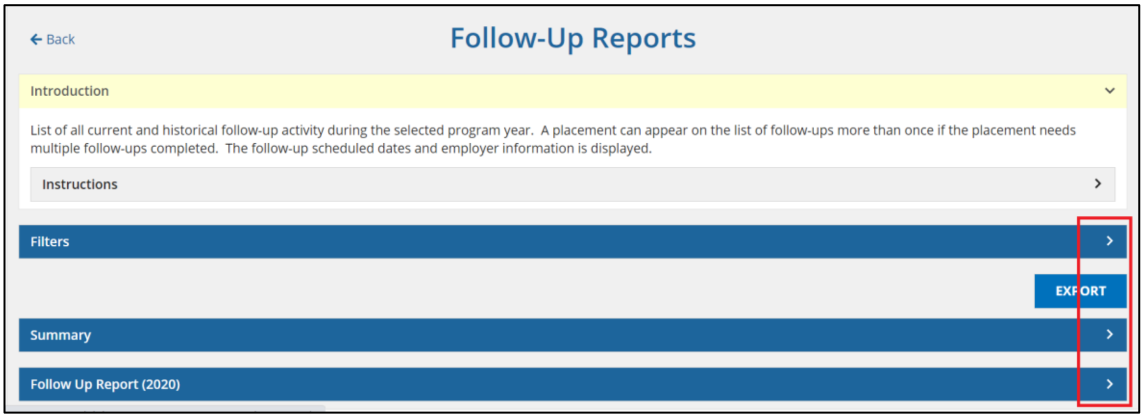

Follow Up Report (2020)

Follow Up Results Details

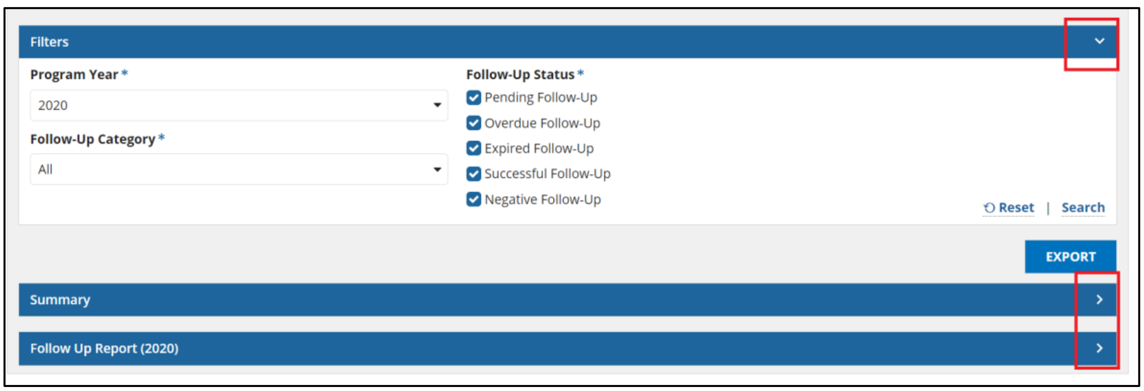
Participant First Name	Participant Last Name	Participant ID	Participant Case ID	Participant Phone	Participant Email	Case Assigned To	Participant Exit Date	Follow-Up1 Scheduled Date	Follw-up1 Completed Date	Follow-Up 1 Status
Juana	Locaspino	9627806	10795608	(505) 495-5500		fkgrad01, fkgrad01	03/17/2021	7/1/2021	7/1/2021	Success

8. The *Follow Up Results Details* section shows more information than can fit within the width of a typical display. To view the remaining details, scroll to the right using the bar at the bottom of the screen.
9. On the right side of this screen, you will see an arrow that expands or contracts the information shown below the title bar. The **Export** button is visible if there is information that can be exported.

   Below is an example where all the information has been contracted:



Below is an example where the filters you selected are expanded, but the *Summary* and *Follow Up Report* sections are contracted:



10. Click **Export**.
11. Click **Refresh** until a file name appears next to **Export File** on the screen.
12. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
13. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.
    a. The file has two tabs, **Summary** and **Details**, corresponding to what you see on the report screen.
    b. The **Details** tab has some additional columns (*Grantee Code, Sub Grantee Code*) not seen in the **Follow Up Results Details** table in your browser window.

2.4 Assignment by Host Agency Report

To run this report:

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Assignment by Host Agency Report** from the *Actions* category.
4. There are no required filters for this report. However, you may choose to select multiple sub-grantees. You can filter by:
    a. **Display Active Host Agencies Only**
    b. **Display Active Assignments Only**
    c. **Assignment Active From (date range)**
    d. **Assignment Active Through (date range)**
    e. **Show Report Summary**
    f. **Show Organization Summary**
    g. **Show Most Recent Assignment Only**

5. Clicking **Reset** will clear the values for the filters.
6. Choose filters and click **Search**.
7. If you select **Show Report Summary** as one of your filters, then those results will be displayed in the top half of the screen.
8. If you select **Show Organization Summary** as one of your filters, then those results will be displayed in the middle of the screen.

Organization Summary

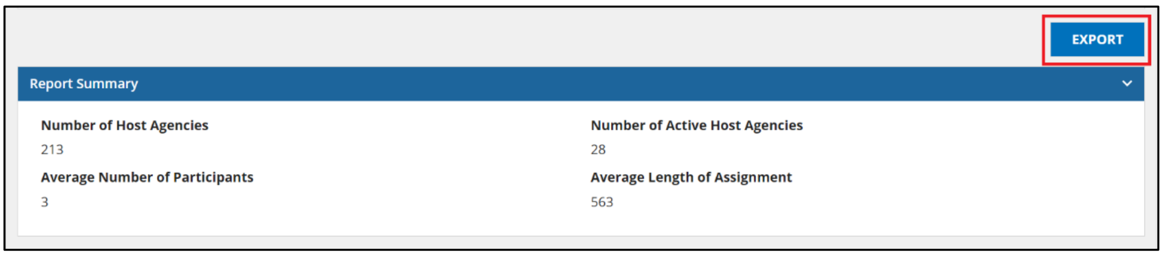
	Name	ID	FEIN	Address	Type	Number of Active Participants	Number of Inactive Participants
≡	University of New Mexico-Gallup Workforce Connection	10125374		705 Gurley Ave., New Mexico, Gallup, 87301	Not For Profit	0	1
≡	Santa Fe Senior Programs	10005495		PO Box 909, New Mexico, Santa Fe, 87504	Government	1	0
≡	Chihuahuan Desert Nature Park	10236164	850386047	100 E. Hadley Ave.,, New Mexico, Las Cruces, 88001	Not For Profit	0	1

    a. Clicking one of the icons to the left of a host agency's name will display *Detail Level Elements* at the bottom of the screen.
    b. 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
Beyuka, Christine	9864307	(505) 862-2479	McKinley County	Smith, Mary	N	Community and Social Service Occupations	8/10/2015	10/1/2015
Rogers, Timothy	9978256	(505) 713-8271	McKinley County	Smith, Mary	N	Farming, Fishing, and Forestry Occupations	9/23/2019	6/14/2020

9. If selected, the *Report Summary*, *Organization Summary*, and *Detail Level Elements* sections of the report can be exported by clicking **Export**.



10. Click **Refresh** until a file name appears next to **Export File** on the screen.
11. Click on the file name or right-click on the file name to download a copy of the file to your default file location.
12. 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.

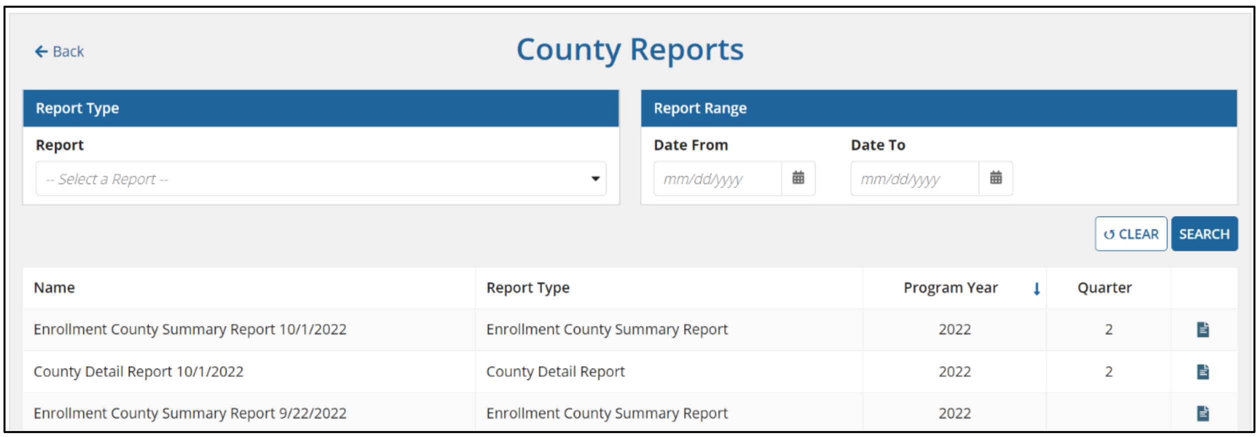
Grantee Name	Subgrantee Name	Host Agency Agreement Date	Host Agency Monitoring Visit Date
AARP Foundation Programs	AARP Foundation SCSEP Atlanta, GA		
AARP Foundation Programs	AARP Foundation SCSEP Broward Dade, FL	8/23/2022	10/19/2023
AARP Foundation Programs	AARP Foundation SCSEP Broward Dade, FL		
AARP Foundation Programs	AARP Foundation SCSEP Bethlehem, PA	8/28/2017	4/20/2023
AARP Foundation Programs	AARP Foundation SCSEP Broward Dade, FL	7/13/2023	6/21/2023
AARP Foundation Programs	AARP Foundation SCSEP Broward Dade, FL	7/13/2023	6/21/2023
AARP Foundation Programs	AARP Foundation SCSEP Broward Dade, FL		
AARP Foundation Programs	AARP Foundation SCSEP Atlanta, GA	8/2/2010	4/22/2022
AARP Foundation Programs	AARP Foundation SCSEP Austin, TX	8/22/2022	1/24/2023

3. Employers

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

3.1 Customer Satisfaction Survey (Future Report)

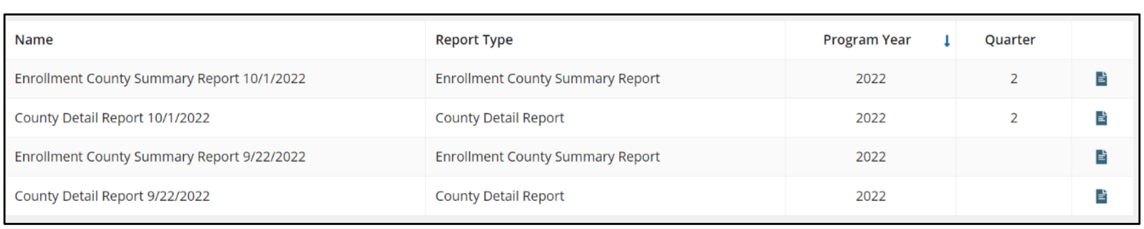
3.2 County Reports



This report is available at the Program Analyst level only.

1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **County Reports** from the *Employers* category.
4. This report can be filtered by the following
   a. **Report**: *Enrollment County Summary Report* or *County Detail Report*.
   b. **Report Range**: Enter a beginning and end date range.

5. Click **Clear** to clear all values for the filters.
6. 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.



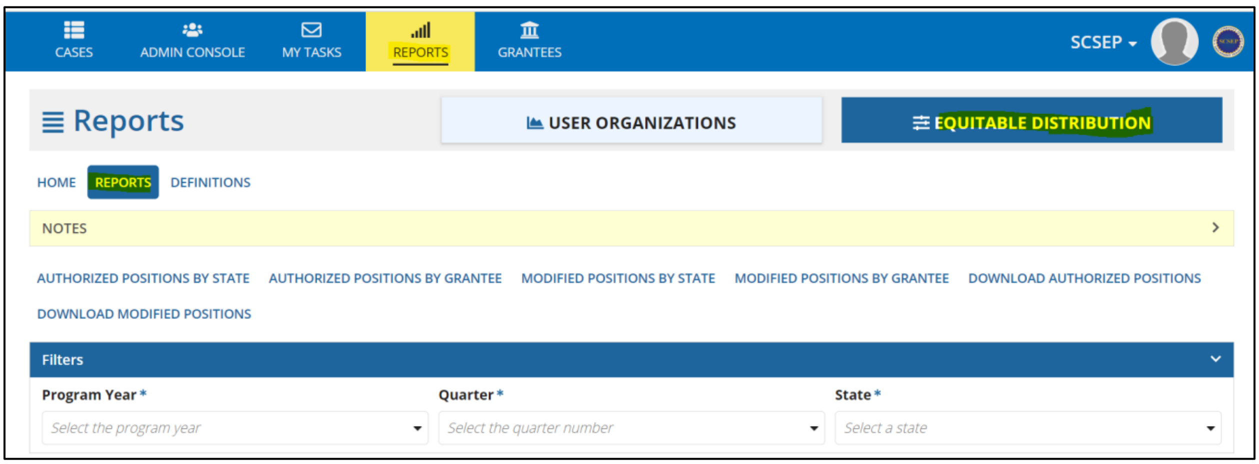
Name	Report Type	Program Year	Quarter	
Enrollment County Summary Report 10/1/2022	Enrollment County Summary Report	2022	2	
County Detail Report 10/1/2022	County Detail Report	2022	2	
Enrollment County Summary Report 9/22/2022	Enrollment County Summary Report	2022		
County Detail Report 9/22/2022	County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

7. Choose the desired filters and click **Search**. The screen will display the available reports for the filters you select.
8. To export an available county report, click the download icon next to **Quarter**. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	FIPS	STATE_NA	COUNTY_I	'AARP Fou	'Alabama'	'Alaska'	'American	'Arizona'	'Arkansas'	'Asociació	'Associate	'California	'Center fo	'Colorado'	'Connectic	'Delaware	'District of
2	001	Alabama	Autauga County														
3	003	Alabama	Baldwin County														
4	005	Alabama	Barbour County										1				
5	009	Alabama	Blount County										2				
6	011	Alabama	Bullock County										4				
7	013	Alabama	Butler County										4				
8	015	Alabama	Calhoun County		7								16				
9	017	Alabama	Chambers County		2												
10	019	Alabama	Cherokee County										6				

4. Equitable Distribution Report

Th Equitable Distribution (ED) report highlights a 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.

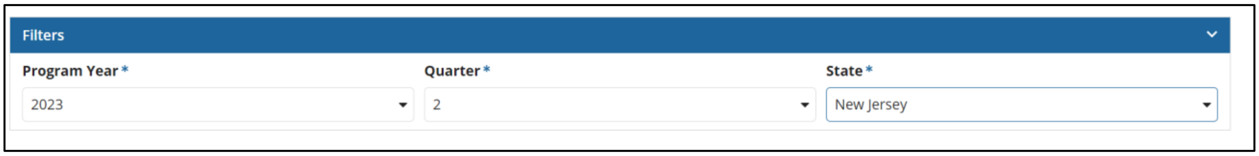


The report can be accessed via the navigational path: **Reports** > **Equitable Distribution** > **Reports**.

The following options are available in the ED report:

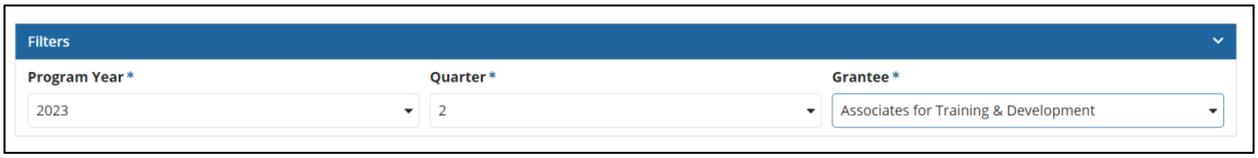
- Authorized Positions By State
- Authorized Positions By Grantee
- Modified Positions By State
- Modified Positions By Grantee
- Download Authorized Positions
- Download Modified Positions

4.1 Authorized Positions by State



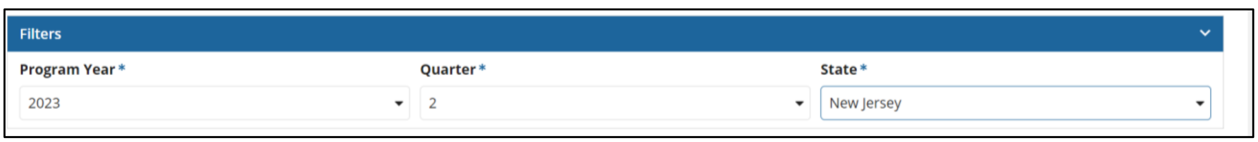
1. Click **Authorized Positions by State**.
2. Select the required filters.
3. Click **Search**.

4.2 Authorized Positions by Grantee



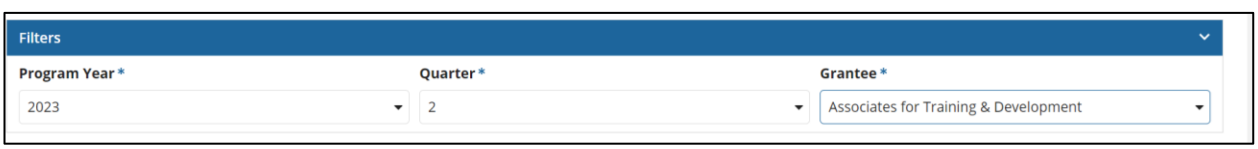
1. Click **Authorized Positions by Grantee**.
2. Select the required filters.
3. Click **Search**.

4.3 Modified Positions by State



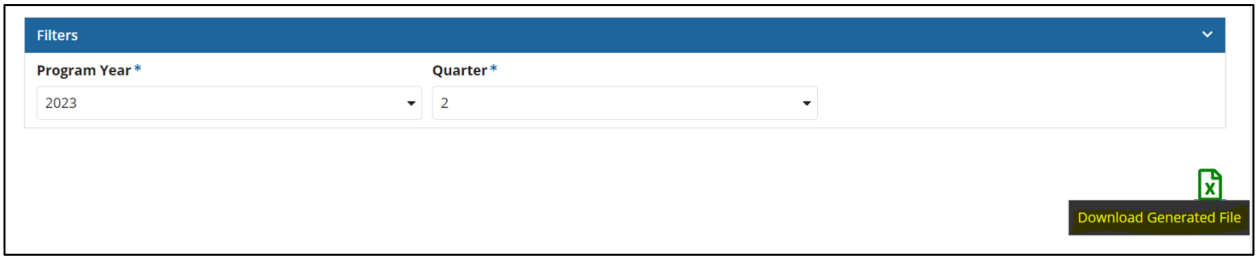
1. Click **Modified Positions by State**.
2. Select the required filters.
3. Click **Search**.

4.4 Modified Positions by Grantee



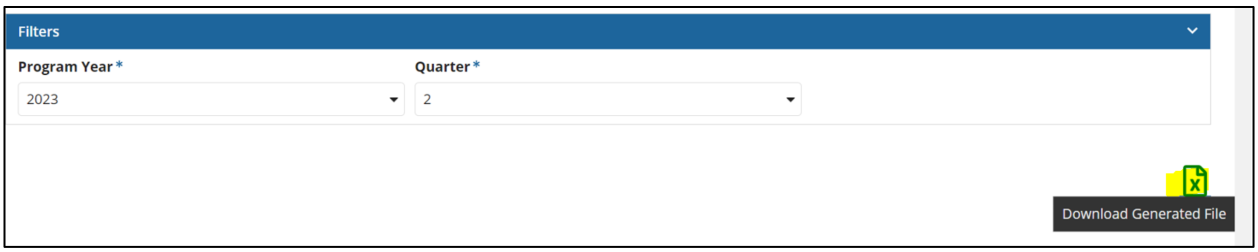
1. Click **Modified Positions by Grantee**.
2. Select the required filters.
3. Click **Search**.

4.5 Download Authorized Positions



1. Click **Download Authorized Positions**.
2. Select the required filters.
3. Click the **Download Generated File** icon.

4.6 Download Modified Positions

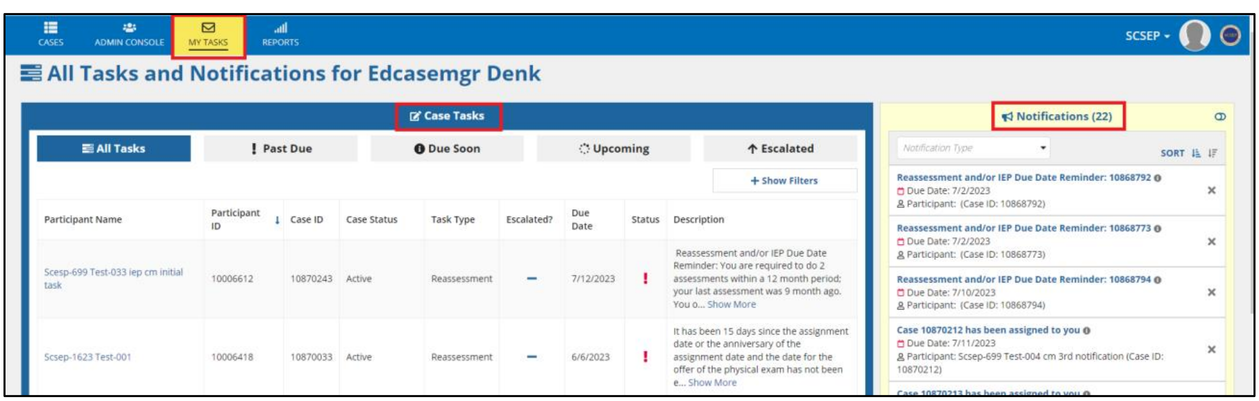


1. Click **Modified Authorized Positions**.
2. Select the required filters.
3. Click the **Download Generated File** icon.

My Tasks

The *My Tasks* screen allows you to view and manage tasks and notifications generated at various stages of the case management process.

The screen is divided into two sections: a *Case Tasks* section on the left with a blue border, and a *Notifications* section on the right with a yellow border. Depending on the user role, both sections may have options to sort between case-level and grantee-level.

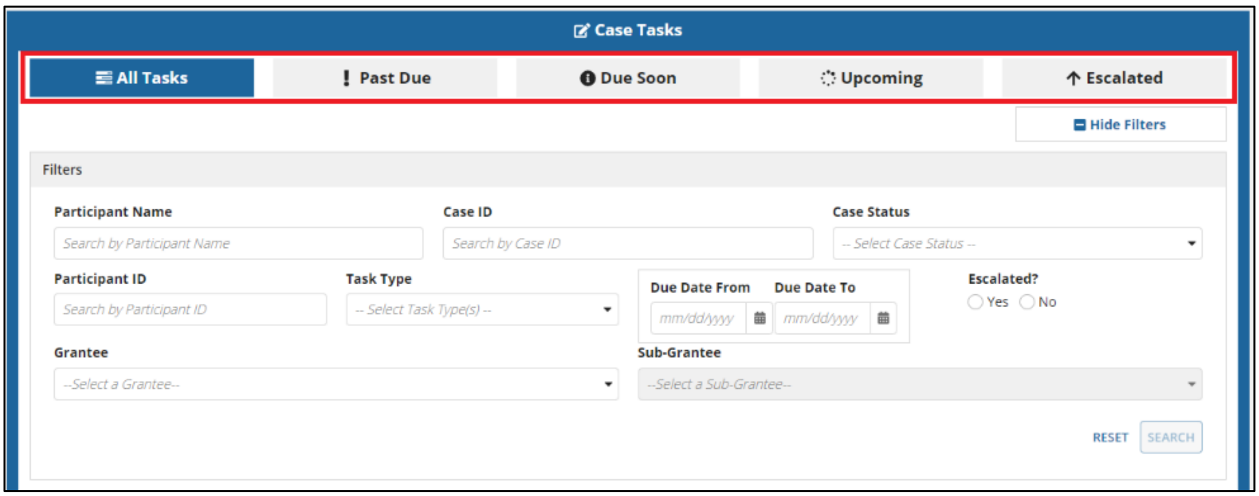


1. Tasks

The *Case Tasks* section displays tasks generated at various stages of the case management process.

Five filter buttons appear in this section:

- **All Tasks**: All tasks assigned to the user
- **Past Due**: Tasks that are past their assigned due date
- **Due Soon**: Tasks that are two days or less from their due date
- **Upcoming**: Tasks that are seven days or less from their due date
- **Escalated**: Tasks that have been escalated from another user



Below the filter buttons is the **Show Filters** button. When clicked, the label on the button changes to **Hide Filters** and additional filter options appear:

- **Participant Name**: Allows you to search by participant name
- **Case ID**: Allows you to search by case ID
- **Case Status**: Allows you to filter results based on one or multiple status categories
- **Participant ID**: Allows you to search by participant ID
- **Task Type**: Allows you to filter results based on one or multiple task types
- **Due Date From**: Allows you to identify tasks with a due date on or after the entered date
- **Due Date To**: Allows you to identify tasks with a due date on or before the entered date
- **Escalated**: Selecting *Yes* displays tasks that have been escalated. Selecting *No* excludes tasks that have been escalated.
- **Grantee**: Allows you to filter results based on the grantee that owns the case
- **Sub-Grantee**: Allows you to filter results based on the sub-grantee that owns the case. If no grantee is selected, this dropdown list is not accessible.

Below the additional filters are two buttons labeled **Reset** and **Search**.

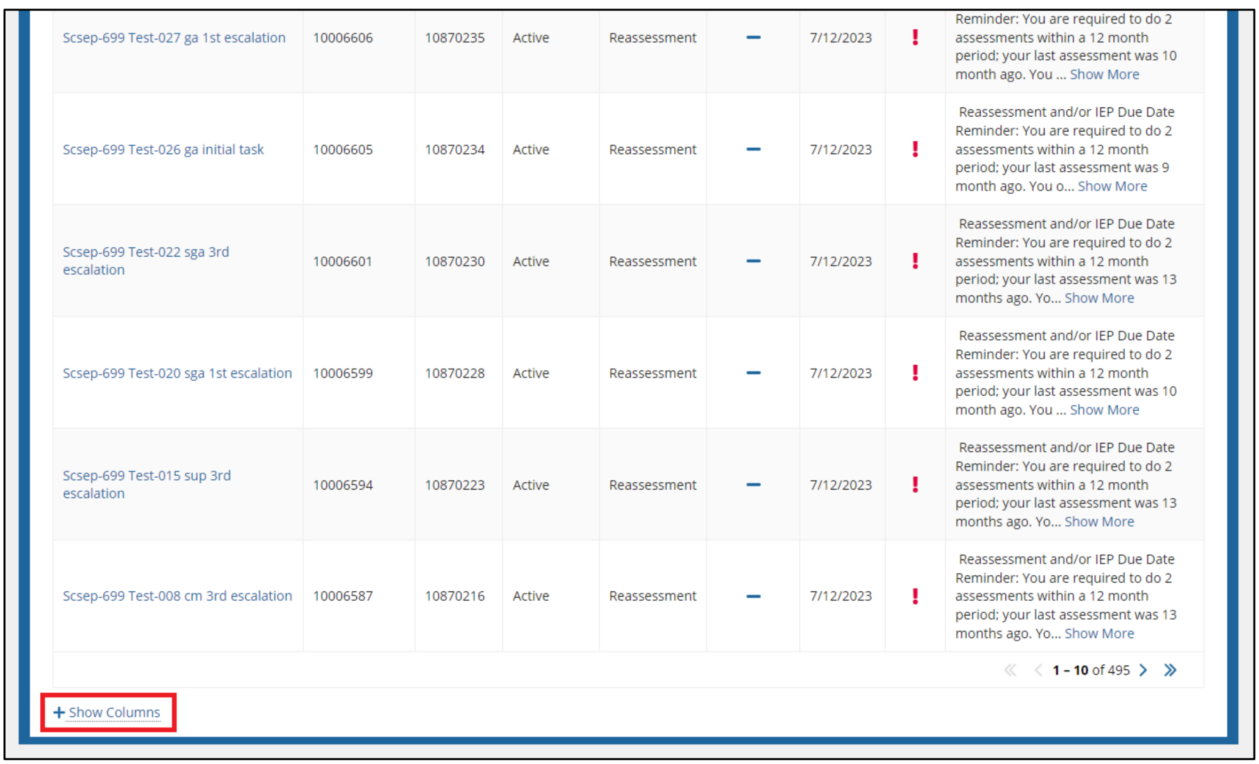
- **Reset** clears all filter values entered.
- **Search** applies the entered filters to the criteria of the search.

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

- **Participant Name**: The first and last name of the participant appear as hyperlinked text. After clicking it, you will be redirected to the task screen for additional information.
- **Participant ID**
- **Case ID**
- **Case Status**
- **Task Type**
- **Escalated**: If the task has been escalated to the user, the word *Yes* appears. Otherwise, a dash appears.
- **Due Date**: Appears in the following format: MM/DD/YYYY
- **Status**: A red exclamation mark icon (**!**) appears in the column when the task is past due. The status of the task appears when you hover over the icon.
- **Description**

Almost all columns on the table can be sorted 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.

To add or remove columns from the table, click **Show Columns** below the table. *Participant Name* is the only column that cannot be removed from the table.



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

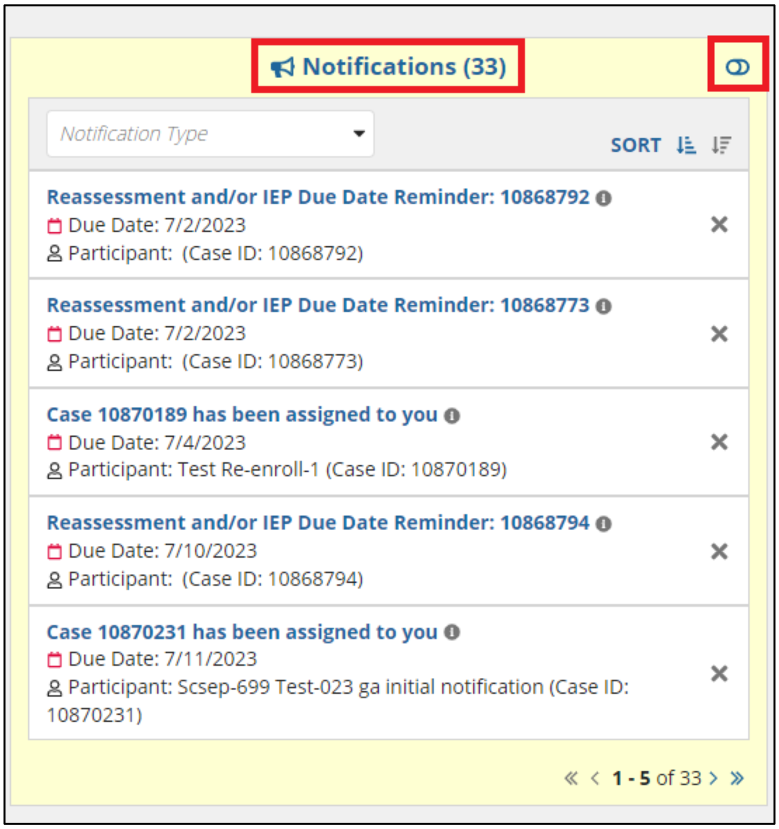
1 - 10 of 495

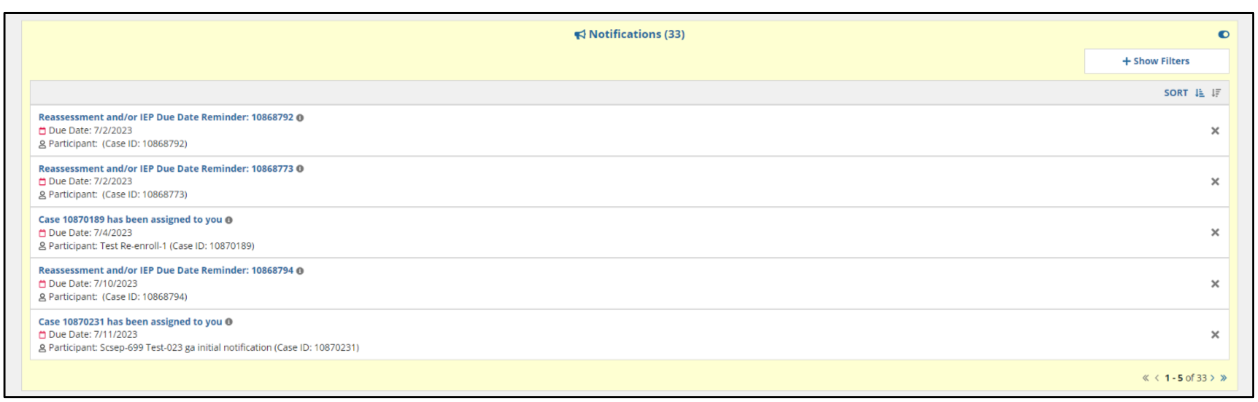
+ Show Columns

2. Notifications

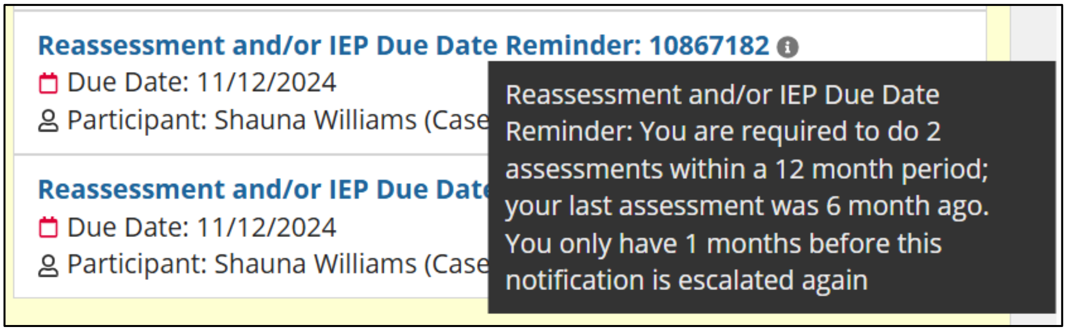
The *Notifications* section displays notifications generated at various stages of the case management process. Grantee Admin users and Program Analysts can toggle the *Case Notifications* and *Grantee Notifications* headers in their *Notifications* section to sort between these two notification types.

Click the toggle button in the upper-right corner of the screen to expand or compress the *Notifications* section:



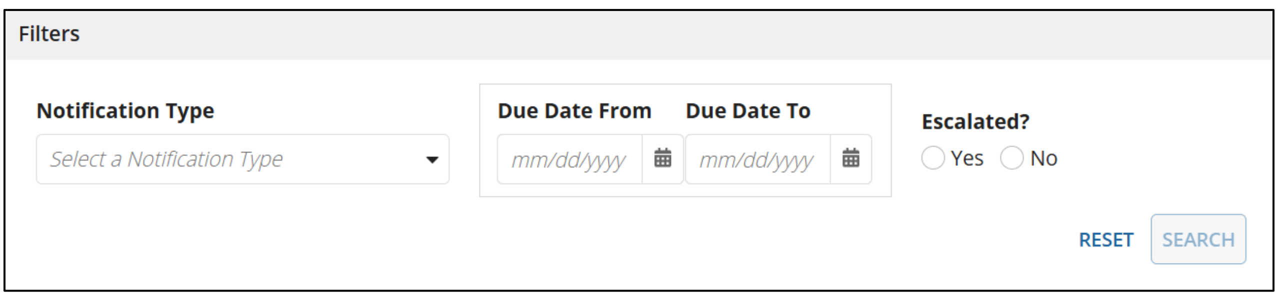


Click on a notification title to display the notification screen, which contains additional information. You can also click the information icon ( ) that appears beside each notification title to view additional details on the notification:



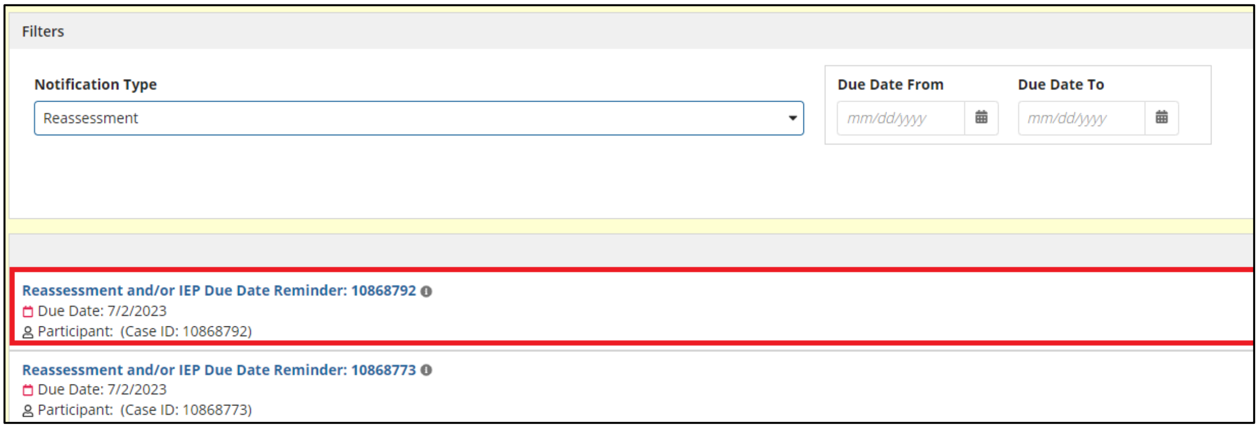
The **Show Filters** button becomes visible once you expand the *Notifications* section. When **Show Filters** is clicked, the label on the button changes to **Hide Filters** and additional filter options appear:

- **Notification Type**: Allows you to filter results based on one or multiple notification types
- **Due Date From**: Allows you to identify notifications with a due date on or after the date entered
- **Due Date To**: Allows you to identify notifications with a due date on or before the date entered
- **Escalated**: Selecting *Yes* displays notifications that have been escalated. Selecting *No* excludes notifications that have been escalated.



Notifications are listed below the filters in the following format:

- **[Name of Notification]: [Case ID]**
- Due Date: [M/D/YYYY]
- Participant: [Participant Name] (Case ID: [Case ID])



An **X** appears on the right of each notification. Clicking the **X** displays the following message:

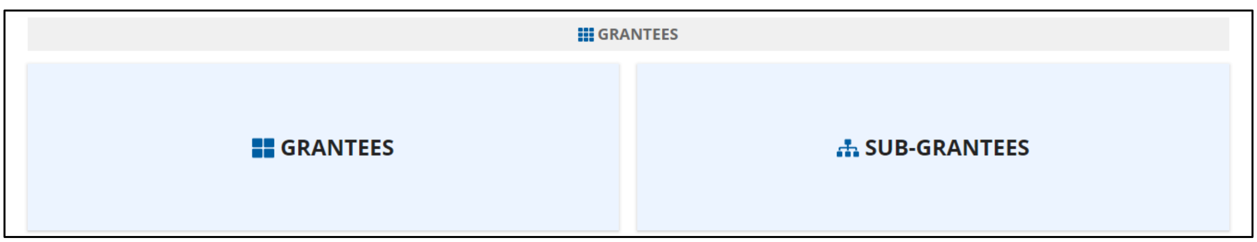
> "Are you sure you would like to dismiss this notification? This action cannot be undone."

- Click **Yes** to remove the notification from the list.
- Click **No** to dismiss the message.

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

Grantees

The *Grantees* screen displays a summary of grantees, sub-grantees, and related actions for grantees. Only Program Analysts can add grantees, sub-grantees and grant numbers. Grantee Admins can utilize search functionality but cannot edit information.



The *Grantees* screen has two sections:

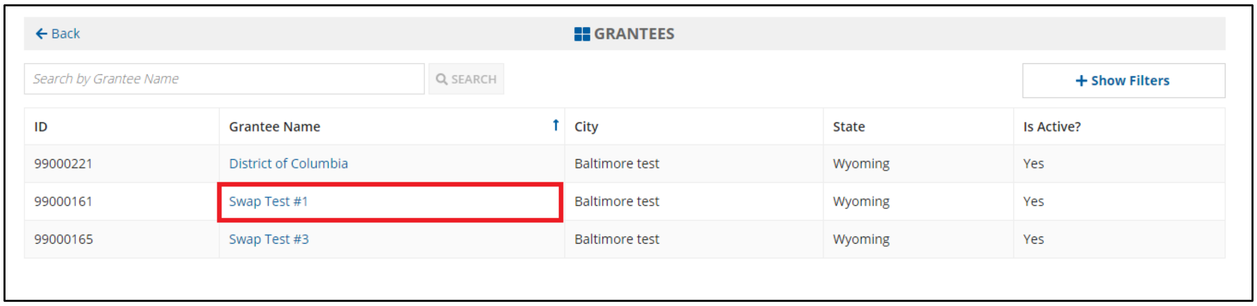
- Grantees
- Sub-Grantees

1. Grantees

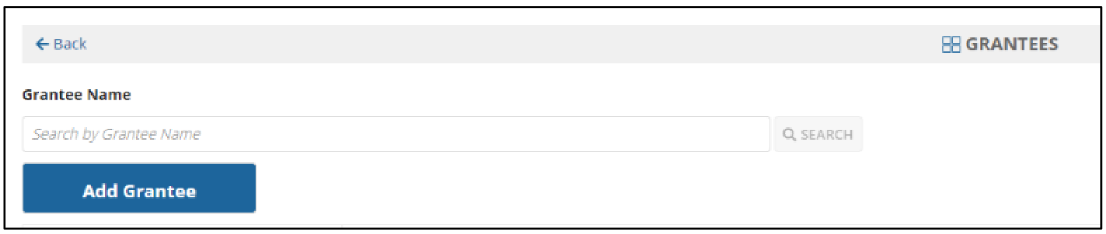
You can search for a grantee by entering their name in the search box and clicking **Search**.

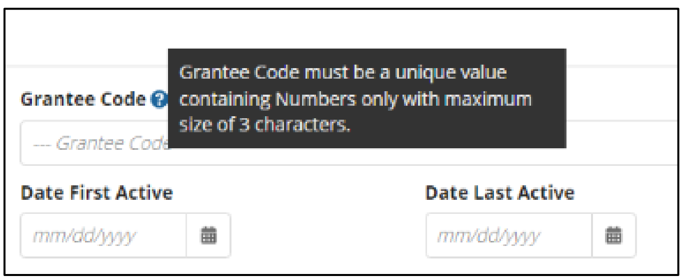
After you run a search, the **ID**, **Grantee Name** and if the **Grantee Is Active** are displayed. The "**Is Active?**" column will read *No* when a grantee has been retired.

Click on the **Grantee Name** in the grid to view the grantee's summary and sub-grantees as well as their related actions:



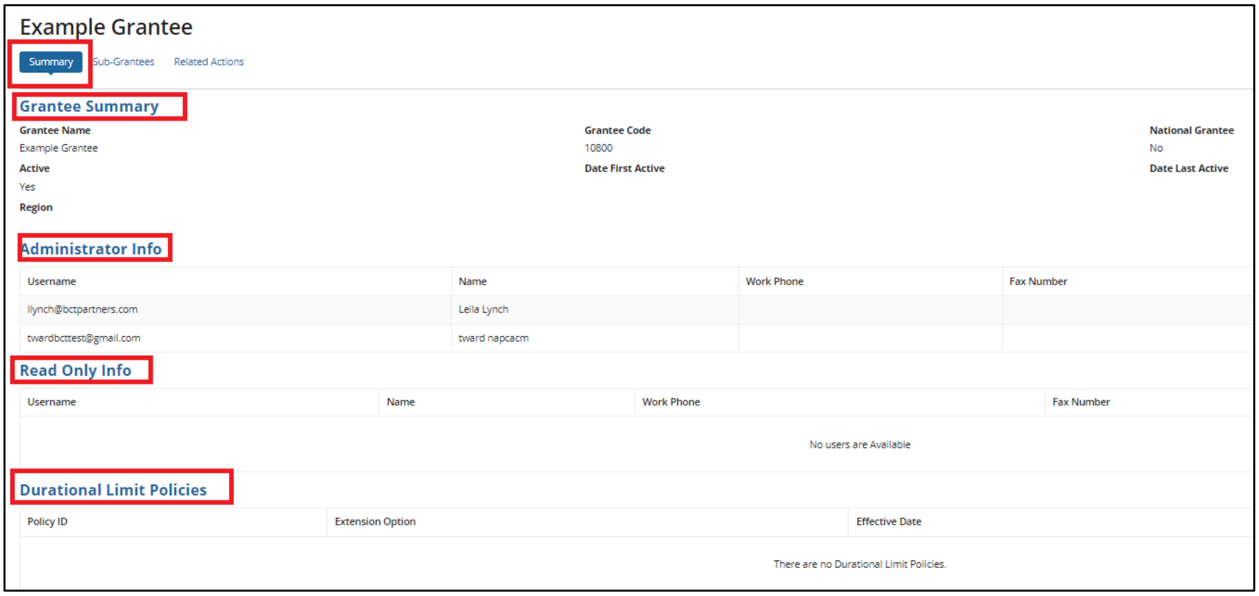
Program Analysts can add a grantee by clicking **Add Grantee**. The system requires a three-digit numeric code for grantees.





1.1 Summary

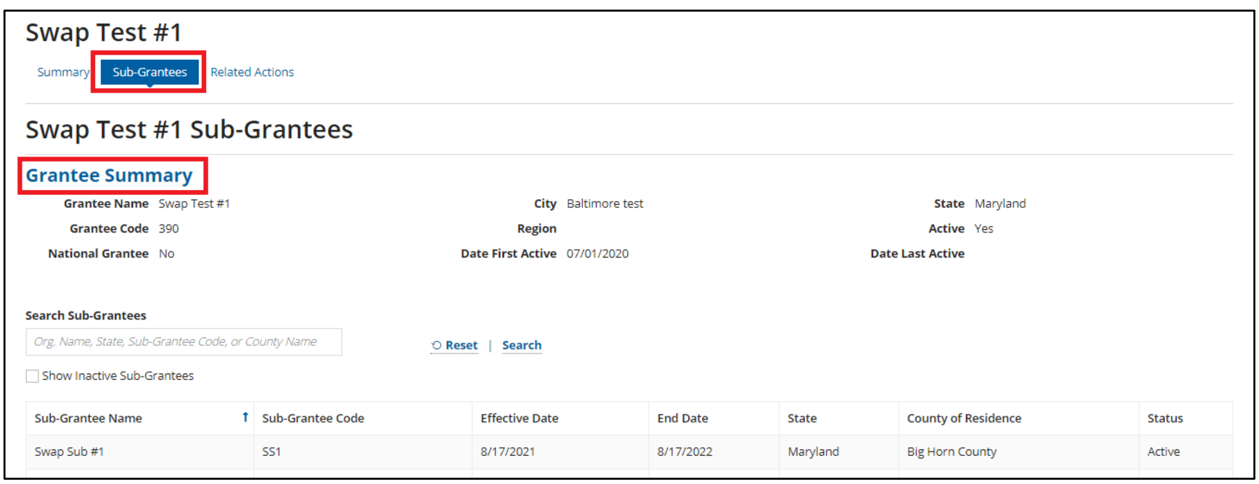
The *Summary* tab displays a summary of the selected grantee, administrator information, read-only information, and durational limit policies.



1.2 Sub-Grantees

On the *Sub-Grantees* tab, a Grantee Admin or Program Analyst can view sub-grantees linked to a grantee. Grantee summary information is displayed in addition to a search bar labeled **Search Sub-Grantees**.

Details of the sub-grantees for the selected grantee are displayed.

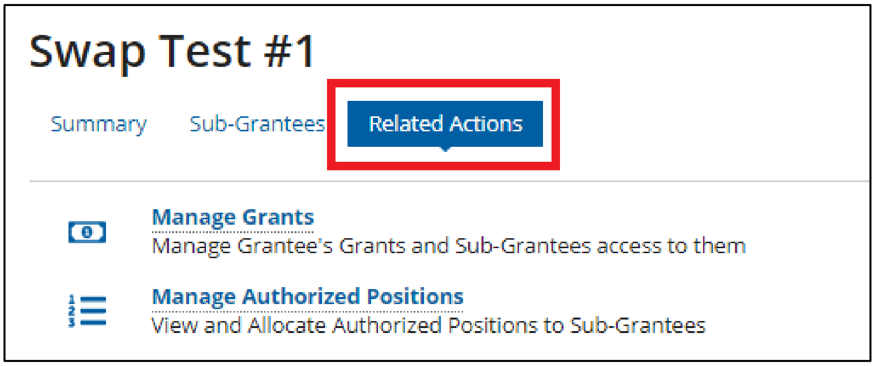


Sub-grantees can be displayed by entering a name in the text field and clicking **Search**. Click **Reset** to clear the data entered and start a new search. Filter the search results by selecting the **Show Inactive Sub-Grantees** checkbox.

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

1.3 Related Actions

Related actions that can be taken by the Grantee Admin and Program Analyst are displayed:

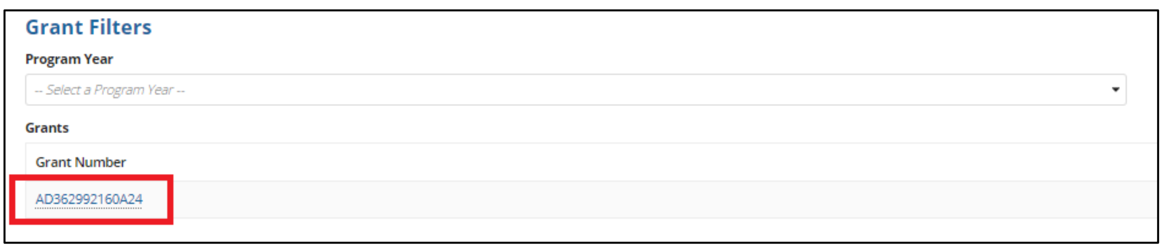


Manage Grants

Grantees and sub-grantees can manage their grant information and activity here, such as adding a new grant or editing an existing grant.

A grantee summary is displayed at the top of the screen.

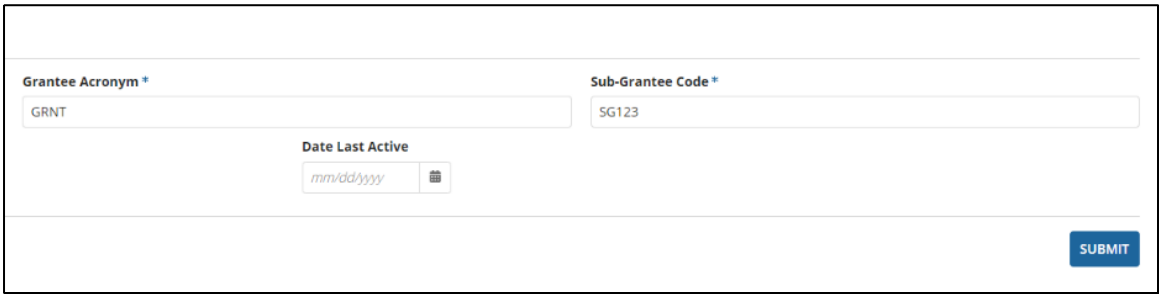
1. To filter a grant by program year, select a **Program Year**.
2. Select a **Grant Number** in the grid to view details:



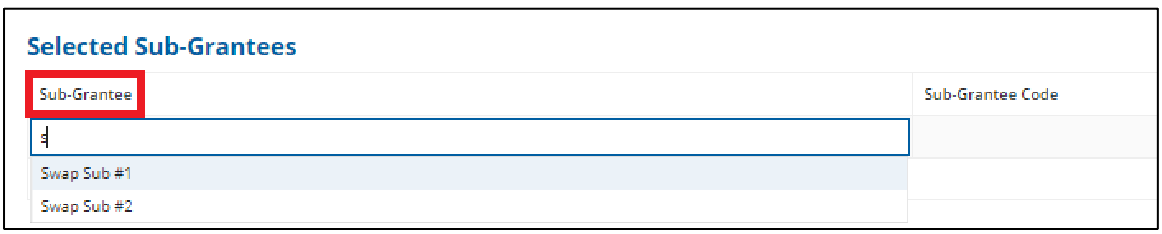
3. To add a new sub-grantee to the selected grant, click **Add Sub-Grantees**.

4. Click **Create New Sub-Grantee**.

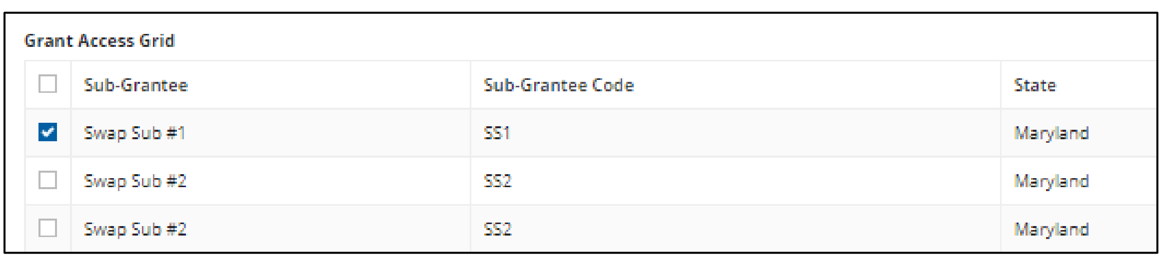
5. Enter the required information into the fields on the screen. The system requires a maximum of ten alphanumeric characters in the **Sub-Grantee Code** field.



6. You can search for a sub-grantee by entering its name in the search box.



7. Click **Submit** to save the chosen option or click **Cancel** to discard the selection.
8. To remove a sub-grantee, click on the checkbox next to the sub-grantee name.



9. Select **Remove From Grant** from the dropdown list, and then click **Submit**.

A confirmation message is displayed:

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

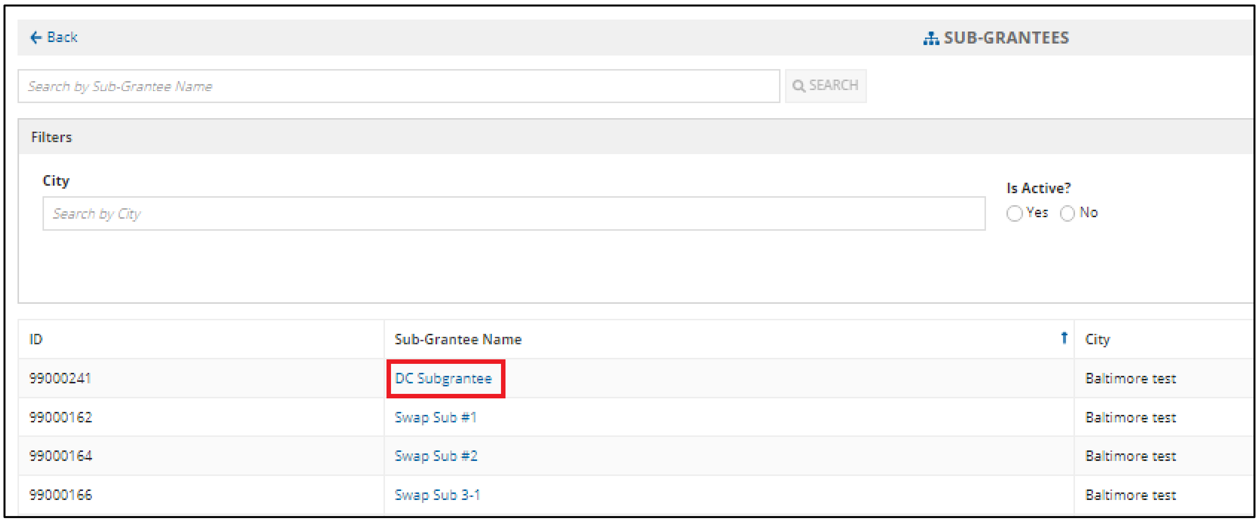
- Click **Yes** to continue with the selected action.
- Click **No** to cancel the selected action.

2. Sub-Grantees

You can manage sub-grantee information and activity on the *Sub-Grantees* screen. Managing your grant includes functions such as editing an existing sub-grantee and adding a new sub-grantee. A summary of the sub-grantees and their related actions are found in this section.

To search for a sub-grantee, enter the sub-grantee's name in the search box and click **Search**.

To view the sub-grantee summary, click on the sub-grantee name in the grid:



The *Sub-Grantee Summary* and *Administrator Info* sections will appear: