



# **Employment and Training Administration (ETA)**

Senior Community Service Employment Program (SCSEP)

Grantee Performance Management System (GPMS)

## **User Guide for Grantees**

Version 1.9

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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Authorized by the Older Americans Act (OAA) and originally enacted in 1965, the Senior Community Service Employment Program (SCSEP, sometimes referred to as Title V) is funded and administered by the Employment and Training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, please contact us through the Help Request Module (HRM) in GPMS.

# 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 life cycle through all phases. Several functional requirements are addressed, including:

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

## User Roles

Within SCSEP GPMS, the following user roles are identified:

Role name	Abilities
<b>Case Manager</b>	<ul style="list-style-type: none"><li>Primary users who move the case through the Intake, Eligibility, Service, Exit, and Outcome milestones</li><li>Ability to add, edit, and read throughout the system</li><li>Ability to create new cases for their organization and to update the details of those cases assigned to them</li><li>Not permitted to submit QPRs</li></ul>
<b>Case Supervisor</b>	<ul style="list-style-type: none"><li>Users with all Case Manager privileges plus the ability to reassign cases and Case Managers</li></ul>

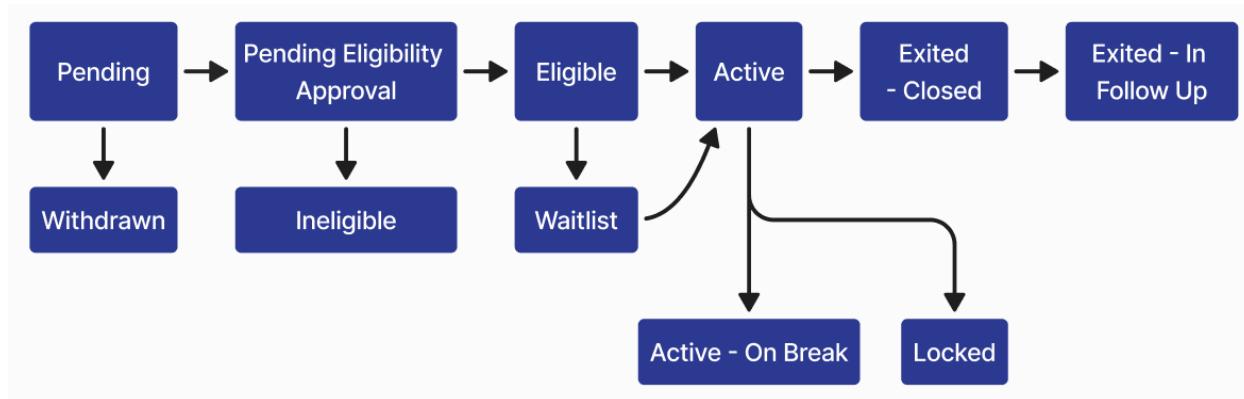
Role name	Abilities
	<ul style="list-style-type: none"> <li>Ability to create users with any role except Grantee or Sub-Grantee Administrator</li> <li>Ability to assign/reassign cases to Case Managers</li> <li>Ability to add, edit, delete, and read throughout the system</li> <li>Ability to review and approve eligibility determination</li> <li>Ability to request re-certification of a case</li> <li>Not permitted to submit QPRs</li> </ul>
<b>Sub-Grantee Administrator</b>	<ul style="list-style-type: none"> <li>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</li> <li>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</li> <li>Ability to create users with any role except another Sub-Grantee Administrator or Grantee Administrator</li> <li>Ability to assign/reassign cases to Case Managers</li> </ul>
<b>Grantee Administrator</b>	<ul style="list-style-type: none"> <li>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</li> <li>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</li> <li>Ability to create users with any role except another Grantee Administrator</li> <li>Ability to assign/reassign cases to Case Managers</li> </ul>
<b>Program Analyst</b>	<ul style="list-style-type: none"> <li>Program Analysts are those users located within the National Program Office</li> <li>Ability to add Grantee Administrators</li> <li>Ability to view all grantee organizations</li> <li>Ability to designate the Grantee Administrators</li> <li>Ability to delete a case</li> <li>Note: Only Program Analysts can view or edit PII information after it has been entered/saved in the application.</li> </ul>
<b>Read Only Global</b>	<ul style="list-style-type: none"> <li>User will have View Access to all grantee/sub-grantee information in the GPMS.</li> <li>If a user is provided with Read Only Global access for a grantee, the same user cannot be provided with Read Only</li> </ul>

Role name	Abilities
	<p>Restricted access (see below) for a specific sub-grantee with the same grantee.</p> <ul style="list-style-type: none"> <li>• User can view all cases and tasks.</li> <li>• Limited access to <i>Admin Console</i> and <i>Reports</i></li> <li>• User can create and export reports but cannot export the extracts</li> <li>• User cannot create cases or edit existing cases</li> </ul>
<b>Read Only Restricted</b>	<ul style="list-style-type: none"> <li>• User has the same access as Read Only Global but only for their specific grantee.</li> </ul>

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
<b>Pending</b>	Case has not been submitted for eligibility determination. Case status is updated to <i>Pending</i> when the Case Manager has completed the case creation process, but the participant has not been moved through all the intake process steps.
<b>Withdrawn</b>	Case has not been submitted for eligibility determination and user has selected <b>Withdraw</b> from the <i>Related Actions</i> tab.
<b>Pending Eligibility Approval</b>	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.
<b>Eligible</b>	Case status is updated to <i>Eligible</i> when eligibility approval has been granted by the Case Supervisor.

Status	Description
<b>Ineligible</b>	Case status is updated to <i>Ineligible</i> if the Case Supervisor deems the case to be disqualified due to specific program requirements.
<b>Waitlist</b>	When the case is determined to be <i>Eligible</i> , the case is placed on a waitlist until a community service assignment is available.
<b>Active</b>	Case status is updated to <i>Active</i> 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.
<b>Active – On Break</b>	An active case has a break in service where the system date is between the break start date and the break end date.
<b>Locked</b>	A case has been locked for exceeding the durational limit.
<b>Exited – Closed</b>	A case has been exited for a reason other than unsubsidized employment.
<b>Exited – In Follow-Up</b>	A case has been exited for unsubsidized employment and has a placement associated with it. <i>Follow-Up</i> is only relevant for enrollments that have a placement. When case status is <i>Exited – In Follow-Up</i> , access is limited to the <i>Summary</i> , <i>Services</i> , <i>Outcomes</i> , <i>Follow-Ups</i> , and <i>Related Actions</i> .

## Universal Features

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

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

Role name	Abilities
Error & warning messages	Used to display required or recommended actions or errors in data.
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 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

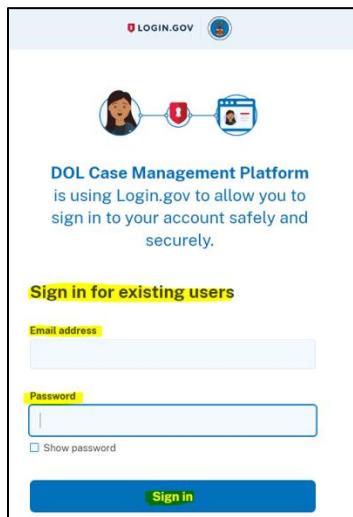
Error messages will be displayed if you are required to take corrective action on a screen before moving forward. Data validation messages are displayed for user information and do not require corrective action before moving forward and appear on the data entry screen while the data is entered.

# 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 Analysts) is displayed across the top of the screen. The tabs displayed may change slightly depending on the user's role and access privileges.



## SCSEP Cases

The Cases tab displays a grid of SCSEP participant cases currently or previously enrolled within the user's grantee(s) and sub-grantee(s).<sup>1</sup>

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.

<sup>1</sup> Note: Not all roles are authorized to perform all the actions documented here.

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.

Filters

Case ID	Participant ID
<input type="text" value="Search by Case ID"/>	<input type="text" value="Search by Participant ID"/>
Status	Case Assigned To
<input style="width: 150px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="Active"/> <span style="font-size: 10px;">▼</span>	<input style="width: 150px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="-- Select a Case Manager --"/> <span style="font-size: 10px;">▼</span>
<input type="checkbox"/> Active On-Break	
Grantee	Grant
<input type="text" value="Start typing Grantee's Name to pick from available options"/>	<input type="text" value="... Select a Grant ..."/>
Sub-Grantee	
Enrollment From	Enrollment To
<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="01/01/2021"/> <span style="font-size: 10px;">▼</span>	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="mm/dd/yyyy"/> <span style="font-size: 10px;">▼</span>
Exit From	Exit To
<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="mm/dd/yyyy"/> <span style="font-size: 10px;">▼</span>	<input style="width: 100px; height: 25px; border: 1px solid #ccc; border-radius: 5px; padding: 2px 5px;" type="text" value="mm/dd/yyyy"/> <span style="font-size: 10px;">▼</span>

## 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**.

**SCSEP Cases**

**NOTE**

By default, only cases with an enrollment date on or after 1/1/2021 are being shown. Click the 'Show Filters' button to update filters for case search.

**Participant Name**

SEARCH

**Participant Cases**

ADD NEW CASE

2. The *Create New Case* screen will appear.

The screenshot shows a 'Create New Case' form with a 'Participant Search' section. It includes fields for 'Social Security Number' and 'Confirm Social Security Number', both marked with an asterisk (\*) to indicate they are required. Below these fields is a search button labeled 'Search existing participant or Add new one'.

3. Enter the applicant's **Social Security Number** (SSN) and then re-enter it in the **Confirm Social Security Number** field.

- The applicant's SSN is masked as a series of asterisks.
- 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.
- 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.

4. Press the **Enter** key or click anywhere on the screen to view the **Reset** and **Search** links.

The screenshot shows a 'Participant Search' form with 'Social Security Number' and 'Confirm Social Security Number' fields, both containing masked SSNs. Below the fields is a search button labeled 'Search' with a red border, indicating it has been clicked. There are also 'Reset' and 'Search' buttons at the bottom.

- Click **Reset** to clear the SSN from both fields and begin a new SSN search.
- Click **Search** to search for a participant with that SSN. When **Search** is clicked:
  - If the applicant's SSN is already in the system, 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.
  - 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." 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] CaselId:[CaselId] 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."
  - 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.”
5. 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.
6. The *Enter Case Details* screen will appear.

### Enter Case Details

Intake	Eligibility	Characteristics	Other Enrollment Information
<b>Case Details</b> <b>Grantee *</b> --Select a Grantee-- <b>Grant *</b> -- Select a Grant -- <b>Application Date *</b> mm/dd/yyyy	<b>Sub-Grantee *</b> --Select a Sub-Grantee-- <b>Case Assigned To *</b> -- Select a Case Manager --		
<b>Participant Information</b> <b>Social Security Number</b> XXX-XX-XXXX <b>First Name *</b> Leila <b>Middle Initial</b> M <b>Last Name *</b> user guide update v1.6 <b>Date of Birth *</b> 06/25/1950 <b>Adequate Connectivity</b> <input type="radio"/> Yes <input type="radio"/> No <b>Adequate Device</b> <input type="radio"/> Yes <input type="radio"/> No			

**Pilot Program Enrollment**

**Sector Demonstration Participant** ? \*

Yes  
 No

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

**Mailing Address**

Address Line 1 \*

Address Line 1

Address Line 2

Address Line 2

City \*  City

State \*

Zip \*  5 Digit Zip Code

**Residence State**

State \*

County of Residence \*

**Secondary Contact Information**

Check if Available

**Participant Demographics**

Sex

Did Participant Identify Race and/or Ethnicity? \*  Yes  No

**Program Introduction**

Pre-Assessment Date \*  mm/dd/yyyy

Program Overview Date \*  mm/dd/yyyy

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

- 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*.

**Enter Case Details**

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

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

**Case Details**

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

- Select the Case Manager assigned to the case. Once a case is created, it may be reassigned only by a Supervisor or an Administrator.
- Enter the applicant's contact information into the fields.
  - If the applicant's physical address is different from the mailing address, select the state of the physical address. Once 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.

**Participant Information**

Social Security Number XXX-XX-XXXX	Primary Phone * (222) 232-6022 <input checked="" type="checkbox"/> Cell?
First Name * Adrian	Alternate Phone <input type="text"/> <input type="checkbox"/> Cell?
Middle Initial A	Email yourname@domain.com
Last Name * Allweather	Employment Status Unemployed
Date of Birth 01/01/1950 <input type="button" value=""/>	
Adequate Connectivity <input checked="" type="radio"/> Yes <input type="radio"/> No	Adequate Device <input checked="" type="radio"/> Yes <input type="radio"/> No

**Mailing Address**

Address 2950 Kirkbride Way  
Apt. # 2  
Indianapolis, Indiana  
46222

**Residence State**

State Indiana  
County of Residence Marion County

9. Select whether the applicant has consented to be in the study of the pilot of the Sector Demonstration.

a. If the individual has consented to be in the study, select Yes and enter the information into the fields on the screen.

**Pilot Program Enrollment**

Sector Demonstration Participant <small>?</small> *	Please Indicate if Treatment or Control *	Start Date *
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Treatment <input type="radio"/> Control	01/01/2024 <input type="button" value=""/>
Name of Career Navigator * Charles Garfield		End Date 06/30/2024 <input type="button" value=""/>
<i>(Show Detailed Instructions)</i>		Reason for exiting Demo * 7. Exited demonstration, re...
		Reason for Exit Other * Too long a drive to participate in

b. If the individual has not consented to be in the study, select No.

**Pilot Program Enrollment**

Sector Demonstration Participant <small>?</small> *
<input type="radio"/> Yes <input checked="" type="radio"/> No
<i>(Show Detailed Instructions)</i>

10. If the applicant has a secondary contact, select the **Check if Available** checkbox under **Secondary Contact Information**. Fill out the contact information fields that appear.

**Secondary Contact Information**

Check if Available

Contact Name	Relationship to Participant		
<input type="text"/>	<input type="text"/>		
Address Line 1	Primary Phone		
<input type="text"/>	<input type="text"/>		
Address Line 2	Alternate Phone		
<input type="text"/>	<input type="text"/>		
City	State	Zip	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/> --- Select a State ---			

11. Enter the applicant's demographics. If Yes is selected for **Did Participant Identify Race and/or Ethnicity?** then an additional field labeled **What is your Race and/or Ethnicity?** will appear and be required. If *Native Hawaiian or Other Pacific Islander* or *Asian* is selected for **What is your Race and/or Ethnicity?**, an additional field labeled **Nationality** will appear.

**Participant Demographics**

Sex	Did Participant Identify Race and/or Ethnicity? *	Nationality
<input type="text"/> --- Select Sex ---	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="text"/> --- Select Nationality ---
<p>What is your Race and/or Ethnicity? *</p> <p>Select all that apply</p> <p><input type="checkbox"/> American Indian or Alaskan Native <small>①</small></p> <p><input checked="" type="checkbox"/> Asian <small>①</small></p> <p><input type="checkbox"/> Black or African American <small>①</small></p> <p><input type="checkbox"/> Hispanic or Latino <small>①</small></p> <p><input type="checkbox"/> Middle Eastern or North African <small>①</small></p> <p><input type="checkbox"/> Native Hawaiian or Other Pacific Islander <small>①</small></p> <p><input type="checkbox"/> White <small>①</small></p>		

12. Enter the applicant's program introduction information. There are two required date fields in the program introduction section: **Pre-Assessment Date** and **Program Overview Date**. If the user selects the *Show Detailed Instructions* link below each date field, detailed instructions for these fields will appear. Users can then select *Hide Instructions* to minimize.

**Note:** Both the **Pre-Assessment Date** and the **Program Overview Date** must not occur in the future based on the date of data entry.

**Program Introduction**

Pre-Assessment Date *	Program Overview Date *
<input type="text"/> mm/dd/yyyy <small>①</small>	<input type="text"/> mm/dd/yyyy <small>①</small>
<p><i>(Hide Instructions)</i></p> <p>Pre-Assessment Date Instruction: As part of the application and enrollment process, sub-grantees must assess applicants' work histories, abilities, and interests in order to make an initial community service assignment. Enter the date this occurred in this field. This date may be on or before the first community service assignment date. A thorough Initial Assessment and development of the Individual Employment Plan are completed after enrollment, and participants are paid for these Participant Required Activities.</p> <p>Program Overview Date Instruction: As part of the application and enrollment process sub-grantees must provide a high-level overview of the SCSEP and the participant's initial community service assignment. Enter the date this occurred in this field. This date may be on or before the first community service assignment date. A thorough Orientation to the SCSEP, detailing program policies, participant obligations and sub-grantee and host agency policies must be completed after enrollment, and participants are paid for these Participant Required Activities.</p>	
<p><input type="button"/> CLOSE</p> <p><input type="button"/> SAVE + CONTINUE <input type="button"/> SAVE + CLOSE</p>	

13. 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.

Intake	Eligibility	Characteristics	Other Enrollment Information
<b>Eligibility</b>  <b>Number in Family</b> <input type="text" value="Number in Family"/> Enter the total members in family including the participant	<b>Preliminary Eligibility Date *</b> <input type="text" value="mm/dd/yyyy"/>  This preliminary eligibility determination will only become final when approved by a supervisor or above.		
<b>Total Includable Family Income *</b> <input type="radio"/> 12 month <input type="radio"/> 6 month	<b>Is Family Income at or below 125% poverty level?</b> <input type="radio"/> Family Income is at or below 125% Poverty Level <input type="radio"/> Family Income is not at or below 125% Poverty Level		
<b>Applicant Certification</b>  Did the applicant sign the Applicant Certification? <input type="radio"/> Yes <input type="radio"/> No			

### 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 you can choose to either confirm or reject the number.
3. Enter the date the preliminary eligibility determination was conducted in the **Preliminary Eligibility Date** field.
4. 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."
5. Select one of the navigation buttons at the bottom of the screen:

- Previous** returns you to the previous screen in the intake process.
- Close** returns you to the main Cases screen without saving information. A confirmation message will appear.
- Save + Close** saves the information entered on the screen and returns you to the main Cases screen.
- 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.

Participant Summary			
Participant Name Adrian Allweather	Participant ID CMS010005587	State New Jersey	Case ID 10869116
Grant Number AD37226216001	Age 73	County Somerset County	Enrollment Dat
System Eligibility Determination: Eligible			
<b>Reasons for Eligibility</b> <ul style="list-style-type: none"> <li>The participant is Unemployed.</li> <li>The participant's income is at or below 125% Poverty Level.</li> <li>The participant's age is within the allowed range.</li> </ul>			
Participant Summary			
Participant Name Adrian Allweather	Participant ID CMS010005587	State New Jersey	Case ID 10869116
Grant Number AD37226216001	Age 73	County Somerset County	Enrollment Dat
System Eligibility Determination: Ineligible			
<b>Reasons for Ineligibility</b> <ul style="list-style-type: none"> <li>The participant's income is not at or below 125% Poverty Level.</li> </ul>			

- 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.

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

- Select one of the navigation buttons at the bottom of the screen:

- Previous** returns you to the previous screen.
- 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*.

<b>Eligibility Determination</b>
SCSEP Eligible?
<input type="radio"/> Yes
<input checked="" type="radio"/> No
<b>Reason for Ineligibility *</b>
<input type="checkbox"/> Age
<input type="checkbox"/> Residence outside of state
<input type="checkbox"/> Employed
<input type="checkbox"/> Income
<input type="checkbox"/> Failed to file complete Application
<input type="checkbox"/> Other

<b>Action Taken if Ineligible *</b>	<b>Comment *</b>
<input type="checkbox"/> Referred to One-Stop	<input type="text" value="0 / 2000"/>
<input type="checkbox"/> Referred to Social Services	
<input type="checkbox"/> Referred to another project	
<input type="checkbox"/> Placed in unsubsidized employment pursuant to MOU	
<input type="checkbox"/> Other	

## 1.3 Characteristics

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

Enter Case Details			
Intake	Eligibility	Characteristics	Other Enrollment Information
<b>✓ Participant Summary</b>			
Participant Name Adrian Allweather	Participant ID CMS010005587	State New Jersey	Case ID 10869116
Grant Number AD3722616001	Age 73	County Somerset County	Enrollment Date
<b>✓ Priority of Service</b>			
<p style="text-align: center;"><span style="color: yellow;">⚠ 'Formerly Incarcerated?' is blank</span></p>			
Veteran Status * <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Status not known	Eligible Veteran Status * <input type="radio"/> Served less than 180 days <input type="radio"/> Eligible veteran <input type="radio"/> Spouse of Veteran <input type="radio"/> Not eligible	Veteran, Post-9/11 Era <input type="radio"/> Yes <input checked="" type="radio"/> No	Received services funded by the State Development Disabilities Agency (SDDA) <input type="radio"/> Yes <input type="radio"/> No
Individual with a Disability * <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Participant did not self-identify	Disability Reported As <input type="radio"/> Self Reported <input type="radio"/> Is Documented	At Risk of Homelessness * <input type="radio"/> Yes <input type="radio"/> No	Urban or Rural * <input type="radio"/> Urban <input type="radio"/> Rural
<p style="text-align: center;"><small>(Show Detailed Instructions)</small></p>			
Homeless * <input type="radio"/> Yes <input type="radio"/> No	At Risk of Homelessness * <input type="radio"/> Yes <input type="radio"/> No	Urban or Rural * <input type="radio"/> Urban <input type="radio"/> Rural	<small>(Lookup RUCA by Zip Code) / (Lookup RUCA by State/County/Tract Code)</small>
Failed to Find Employment After Using WIOA Title I * <input type="radio"/> Yes <input type="radio"/> No	Low Literacy Skills * <input type="radio"/> Yes <input type="radio"/> No	Low Employment Prospects * <input type="radio"/> Yes <input type="radio"/> No	Formerly Incarcerated? * <input type="radio"/> Yes <input type="radio"/> No
<p style="text-align: center;"><small>(Show Detailed Instructions)</small></p>			
Limited English Proficiency * <input type="radio"/> Yes <input type="radio"/> No	Frail * <input type="radio"/> Yes <input type="radio"/> No	75 or Older * <input type="radio"/> Yes <input type="radio"/> No	Formerly Incarcerated? * <input type="radio"/> Yes <input type="radio"/> No
Date Severe Disability Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Frail Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Old Enough but Not Receiving SS Title II * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Low Literacy Skills Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>
Severely Limited Employment Prospects in Area of Persistent Unemployment * <input type="radio"/> Yes <input type="radio"/> No	Old Enough but Not Receiving SS Title II Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Old Enough but Not Receiving SS Title II Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	
Date Severely Limited Employment Prospects in Area of Persistent Unemployment Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Limited English Proficiency * <input type="radio"/> Yes <input type="radio"/> No	Date Limited English Proficiency Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	
<b>✓ Most In Need Waiver Factors</b>			
Severe Disability * <input type="radio"/> Yes <input type="radio"/> No	Frail * <input type="radio"/> Yes <input type="radio"/> No	75 or Older * <input type="radio"/> Yes <input type="radio"/> No	Formerly Incarcerated? * <input type="radio"/> Yes <input type="radio"/> No
Date Severe Disability Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Frail Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Old Enough but Not Receiving SS Title II * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Low Literacy Skills Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>
Severely Limited Employment Prospects in Area of Persistent Unemployment * <input type="radio"/> Yes <input type="radio"/> No	Old Enough but Not Receiving SS Title II Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Date Old Enough but Not Receiving SS Title II Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	
Date Severely Limited Employment Prospects in Area of Persistent Unemployment Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	Limited English Proficiency * <input type="radio"/> Yes <input type="radio"/> No	Date Limited English Proficiency Last Updated * <input type="text" value="mm/dd/yyyy"/> <input type="button" value="Calendar"/>	
<p style="text-align: center;"><small>(Show Detailed Instructions)</small></p>			

<b>Other Characteristics</b>		
<b>Public Assistance</b>		
<b>Receiving Temporary Assistance for Needy Families (TANF) *</b>		<b>Receiving Supplemental Nutrition Assistance (SNAP) *</b>
<input type="radio"/> Yes <input type="radio"/> No		<input type="radio"/> Yes <input type="radio"/> No
<b>Supplemental Security Income (SSI) / Social Security Disability Insurance (SSDI) Status *</b>		<b>Subsidized Housing *</b>
<input type="radio"/> SSI <input type="radio"/> SSDI <input type="radio"/> SSI and SSDI <input type="radio"/> SSI and Ticket Holder <input type="radio"/> SSDI and Ticket Holder <input type="radio"/> Both SSI and SSDI and a Ticket Holder <input type="radio"/> Does not meet above conditions		<input type="radio"/> Yes <input type="radio"/> No
<b>State or Local Welfare (General Assistance) *</b>		<b>Other Public Assistance Recipient *</b>
<input type="radio"/> Yes <input type="radio"/> No		<input type="radio"/> Yes <input type="radio"/> No
<b>Unemployment Compensation Eligibility Status *</b>		
<input type="radio"/> Claimant Referred by Reemployment Services and Eligibility Assessment (RESEA) <input type="radio"/> Claimant Referred by Worker Profiling and Reemployment Services (WPRS) <input type="radio"/> Claimant Not Referred by RESEA or WPRS <input type="radio"/> Exhaustee <input type="radio"/> Claimant is Exempt <input type="radio"/> Neither Claimant nor Exhaustee		

<b>Participant Characteristics Comments</b>
<div style="border: 1px solid #ccc; height: 100px; width: 100%;"></div>
0 / 2000

<b>Veteran Status</b>	<b>Eligible Veteran Status</b>	<b>Veteran, Post-9/11 Era *</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Status not known	<input type="radio"/> Served less than 180 days <input checked="" type="radio"/> Eligible veteran <input type="radio"/> Spouse of Veteran <input type="radio"/> Not eligible	<input type="radio"/> Yes <input type="radio"/> No
<small>(Show Detailed Instructions)</small>		

If a user selects Yes for **Veteran Status**, they must also respond to the **Eligible Veteran Status** and **Veteran, Post 9/11 Era** questions. If they select No for **Veteran Status**, these two questions will be grayed out and not editable.

### Individual with a Disability

<b>Individual with a Disability</b>	<b>Disability Reported As *</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Participant did not self-identify	<input type="radio"/> Self Reported <input type="radio"/> Is Documented
<small>(Show Detailed Instructions)</small>	

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.

<b>Homeless *</b>	<b>At Risk of Homelessness *</b>
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
<small>(Show Detailed Instructions)</small>	

## 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.

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

## Urban or Rural

The field for **Urban and Rural** is automatically populated using the zip code of the mailing address entered in the case's *Intake* screen.

## 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**.

<b>Formerly Incarcerated?*</b> <input checked="" type="radio"/> Yes <input type="radio"/> No
<p><b>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</b></p>
<b>Formerly Incarcerated?</b> <input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Date Formerly Incarcerated Last Updated</b> <input type="text" value="mm/dd/yyyy"/>

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 **Yes** is selected for that field, **Date Formerly Incarcerated Last Updated** becomes required as well.

<p><b>Formerly Incarcerated?*</b></p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>
<p><b>Formerly Incarcerated?*</b></p> <p><input checked="" type="radio"/> Yes</p> <p><input type="radio"/> No</p>
<p><b>Date Formerly Incarcerated Last Updated*</b></p> <p><input type="text"/> mm/dd/yyyy <input type="button" value="Calendar"/></p>

<p><b>Veteran Status*</b></p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><input type="radio"/> Status not known</p>	<p><b>Eligible Veteran Status*</b></p> <p><input type="radio"/> Served less than 180 days</p> <p><input type="radio"/> Eligible veteran</p> <p><input type="radio"/> Spouse of Veteran</p> <p><input type="radio"/> Not eligible</p> <p><a href="#">(Show Detailed Instructions)</a></p>	<p><b>Veteran, Post-9/11 Era</b></p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>
<p><b>Individual with a Disability*</b></p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><input type="radio"/> Participant did not self-identify</p> <p><a href="#">(Show Detailed Instructions)</a></p>		
<p><b>Disability Reported As</b></p> <p><input type="radio"/> Self Reported</p> <p><input type="radio"/> Is Documented</p>		
<p><b>Received services funded by the State Development Disabilities Agency (SDDA)</b></p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>		
<p><b>Homeless*</b></p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p> <p><a href="#">(Show Detailed Instructions)</a></p>		
<p><b>At Risk of Homelessness*</b></p> <p><input type="radio"/> Yes</p> <p><input type="radio"/> No</p>		
<p><b>Urban or Rural*</b></p> <p><input type="radio"/> Urban</p> <p><input type="radio"/> Rural</p> <p><a href="#">(Lookup RUCA by Zip Code) / (Lookup RUCA by State/County/Tract Code)</a></p>		

This section provides a number of links which give more detailed explanations for these characteristics, plus a lookup table for the **Urban or Rural** section.

## 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																
<p><b>Participant Summary</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Participant Name</th> <th style="width: 25%;">Participant ID</th> <th style="width: 25%;">State</th> <th style="width: 25%;">Case ID</th> </tr> </thead> <tbody> <tr> <td>Adrian Allweather</td> <td>CMS010005587</td> <td>New Jersey</td> <td>10869116</td> </tr> <tr> <td><b>Grant Number</b></td> <td><b>Age</b></td> <td><b>County</b></td> <td><b>Enrollment Date</b></td> </tr> <tr> <td>AD37226216001</td> <td>73</td> <td>Somerset County</td> <td></td> </tr> </tbody> </table>				Participant Name	Participant ID	State	Case ID	Adrian Allweather	CMS010005587	New Jersey	10869116	<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>	AD37226216001	73	Somerset County	
Participant Name	Participant ID	State	Case ID																
Adrian Allweather	CMS010005587	New Jersey	10869116																
<b>Grant Number</b>	<b>Age</b>	<b>County</b>	<b>Enrollment Date</b>																
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**.

### 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 Vocational Education program?

- Yes
- No
- Unknown

#### Co-Enrollment in WIOA Vocational Rehabilitation program?

- Yes

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.

Program Introduction	
<b>Pre-Assessment Date</b>	<b>Program Overview Date</b>
<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="mm/dd/yyyy"/>

## 1.5 Intake Checklist

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

Elements 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.

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

## 2. 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**.

### Adrian Allweather (Case ID: 10869116)

ADD ASSIGNMENT
ADD TO WAITLIST

Summary
Assignments
Participant Required Actions
Participant History
Extensions
Related Actions

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

Participant Summary

**Participant Name**  
 Adrian Allweather  
**Grant Number**  
 AD37226216001

**Participant ID**  
 CMS010005587

**State**  
 New Jersey

**Case ID**  
 10869116

**Age**  
 73

**County**  
 Somerset County

**Enrollment Date**  
No Enrollment Date

Assignments

Assignment Id
Assignment Date
Assignment End Date
Host Agency Name

No Assignments available

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.

### Assignment Checklist

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

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.

### Intake Checklist

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

## 2.1 Add Assignments

To add an assignment:

1. Click **Add Assignment**.



Belinda Chesterfield (Case ID: 10869117)

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

ADD ASSIGNMENT ADD TO WAITLIST

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.

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

1 - 10 of 1,548 < > SELECT ORGANIZATION
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.



Assignment Date \*

01/01/2023

Mandatory fields are marked with an asterisk.

Assignment Start Date \*

01/01/2023

Assignment End Date \*

11/30/2024

Optional fields are not marked with an asterisk.

Host Agency \*

SQL Code Shop

Site Name and Location

Santa Fe Mall

Survey Contact \*

Dr. Lovelace, Ada

## 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.

Assignment Details | Approved Breaks | Training and Services

### Assignment Details

**Edit**

Assignment Date*	Host Agency*	Assigned To*
1/1/2024 X	SQL Code Shop X	<input checked="" type="radio"/> Grantee or sub-recipient/ local project
Assignment Start Date	Site Name and Location	<input type="radio"/> Workforce Partner
1/1/2024 X	Santa Fe Mall	<input type="radio"/> Other host agency
Assignment End Date	Survey Contact <small>?</small> *	<input type="radio"/> General
mm/dd/yyyy	Dr. Lovelace, Ada	<input type="radio"/> Elderly
Job Code	Supervisor	CSA Code*
Computer and Mathematical Occupations	Please select a Supervisor	E1. Project Administration
Workers' Comp Code at Host Agency	Select only if Supervisor is different than Contact	CSA Title
12345	Supervisor Funding Source Type	Programmer
	<input checked="" type="radio"/> Federal	Wage per Hour*
	<input type="radio"/> Non-federal	\$25.00
	Participant's Schedule	Hours per week*
	Type Participant's Schedule here	40
		Comments <small>?</small>
		Type comments here
		X CANCEL ✓ SAVE

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**.

**Supervisor Funding Source Type**

Federal

Non-federal

**Participant's Schedule**

Monday: 9 AM to 5 PM.  
Tuesday: 12 PM to 4 PM.  
Wednesday: 9 AM to 5 PM.  
Thursday: 12 PM to 4 PM.  
Friday: 9 AM to 5 PM.  
Budgeted for 40 hours, but adjusted to accommodate medical appointments.

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

Assignment Details | Approved Breaks | Training and Services

**Assignment Details**

Assignment Date	01/01/2024	Host Agency	SQL Code Shop
Assignment Start Date	01/01/2025	Site Name and Location	Santa Fe Mall
Assignment End Date		Survey Contact	Dr. Lovelace, Ada
Job Code	Computer and Mathematical Occupations	Supervisor	
Workers' Comp Code at Host Agency	12345	Supervisor Funding	Federal
		Source Type	
		Participant's Schedule	Monday: 9 AM to 5 PM. Tuesday: 12 PM to 4 PM. Wednesday: 9 AM to 5 PM. Thursday: 12 PM to 4 PM. Friday: 9 AM to 5 PM. Budgeted for 40 hours, but adjusted to accommodate medical appointments.

## 2.3 Delete Assignments

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

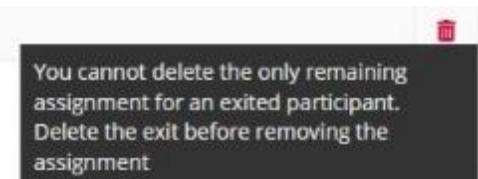
1. Go to the *Assignments* tab.
2. If the participant has multiple assignments, select the **Assignment ID** of the assignment you wish to delete.
3. To start the deletion process, click the **Delete** icon.
4. A confirmation message appears: "Confirmation: Are you sure you want to delete this assignment?"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

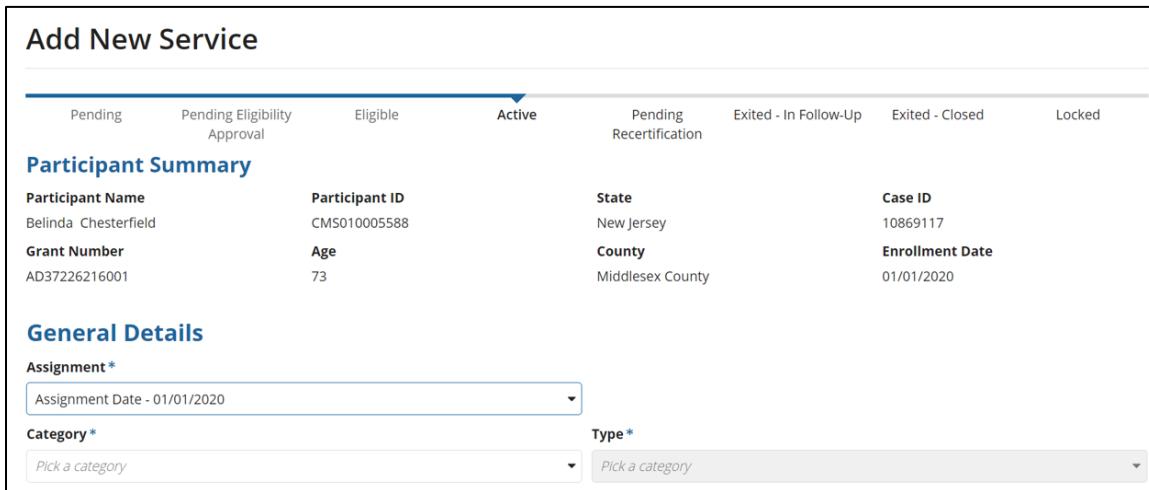
To add a new service:

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



The top screenshot shows the 'Assignments' tab selected. The bottom screenshot shows the 'Related Actions' tab selected, with the 'Add Assignment Service' option highlighted.

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



The 'Add New Service' screen displays various tabs for participant status: Pending, Pending Eligibility Approval, Eligible, Active, Pending Recertification, Exited - In Follow-Up, Exited - Closed, and Locked. The 'Active' tab is active. The 'Participant Summary' section provides details for Belinda Chesterfield, including Participant Name, Participant ID, State, Case ID, Grant Number, Age, County, and Enrollment Date. The 'General Details' section includes fields for Assignment (Assignment Date - 01/01/2020), Category (Pick a category), and Type (Pick a category).

3. Select the **Category** and **Type** of Education and Training or Supportive Services provided, along with the **Percent Support Service Paid by Grantee**. Then enter the **Start Date** under

the *Service Details* section.

**General Details**

Assignment \*

Assignment Date - 10/24/2024

Category \*

Pick a category

Type \*

Pick a type

Training/Service Completed?

Yes  No

Job Code for which Training is Provided

Job Code

Percent Support Service Paid by Grantee ? \*

Percentage of Services

Total Paid for Provision of Training

Total Paid Training

**Service Details**

Start Date \*

mm/dd/yyyy

Expected End Date

mm/dd/yyyy

Actual End Date

mm/dd/yyyy

Is this a One Day Service? \*

Yes  No

Comments

Type comments here

4. Optional fields for **Training/Service Completed**, **Job Code for which Training is Provided**, **Participant's Compensation Training Code** and **Total Paid for Provision of Training** can be entered when adding a new assignment service, or by editing the Training and Service Details of an existing service.
5. If the user selects Yes for the field **Is this a One Day Service?**, **Expected End Date** and **Actual End Date** will be grayed out and not editable. Upon saving the service, a message will appear notifying the user that **Expected End Date** and **Actual End Date** will be set to the entered **Start Date**.

**Service Details**

Start Date \*

mm/dd/yyyy

Expected End Date

mm/dd/yyyy

Actual End Date

mm/dd/yyyy

Is this a One Day Service? \*

Yes  No

This is a One Day service, so the Expected End date and the Actual End Date are set to the same as the Start date. Do you wish to continue?

NO

YES

6. 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

**Additional Fields**

**Provider**

**Supportive Service Provided By \***

**Other (Specify) \***

**CANCEL** **SAVE + ADD ANOTHER** **SAVE + CLOSE**

7. From the list of results, select an agency and click **Select Organization**. The selected agency is displayed in the **Provider** field. If adding a supportive service, the dropdown **Supportive Service Provided by** will display, with an option to select one or multiple selections. If **Other** is selected, an additional **Other (Specify)** field will display as a required field.
8. To add another service, click **Save + Add Another**.
9. To save the current service without adding another, click **Save + Close**.
10. If the participant has consented to be in the study of the Sector Demonstration pilot, two additional options appear in the **Type** field: *Demo Occupational Skills Training (OST)* and *Demo On-the-job-Training (OJT)*.
11. If either of those options are selected, fewer fields appear under the *General Details* section of the form. Moreover, different fields appear under the *Service Details* and *Additional Fields* sections.

**General Details**

**Assignment \***

**Category \***

**Type \***

**Training/Service Completed?**

**Job Code for which Training is Provided**

**Participant's Compensation Training Code**

**Percent Support Service Paid by Grantee**

**Total Paid for Provision of Training**

**General Details**

<b>Assignment</b> Assignment Date - 01/01/2024	<b>Type</b> Demo Occupational Skills Training (OST)
<b>Category</b> Education and Training	

**Service Details**

<b>Start Date</b> <input type="text" value="mm/dd/yyyy"/>	<b>End Date</b> <input type="text" value="mm/dd/yyyy"/>
<b>Completed Training</b> <input type="radio"/> Yes <input type="radio"/> No	
<b>Comments</b> <small>type comments here</small>	

**Additional Fields**

<b>Provider</b> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;">           State: <input type="text" value="Select a State"/> City: <input type="text" value="City"/> Organization Name: <input type="text" value="Organization Name"/>  <input type="button" value="SEARCH"/> </div>		
<b>Hours per week</b> <input type="text" value="Hours per Week"/>	<b>Planned Hours</b> <input type="text" value="Planned Hours"/>	<b>Actual Hours</b> <input type="text" value="Actual Hours"/>
<b>Occupation of Demonstration Training</b> <input type="text" value="OST Code"/>		
<b>Any third-party certification received (include name)</b> <input type="text" value="Any third-party certification received (include name)"/>		

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

Assignment Details | Approved Breaks | **Training and Services**
Training and Services

**Assignment Details**

Assignment Date 01/01/2024	
Host Agency SQL Code Shop	

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

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.

Dennis Brownfield (Case ID: 10879664)



... ▾

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

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

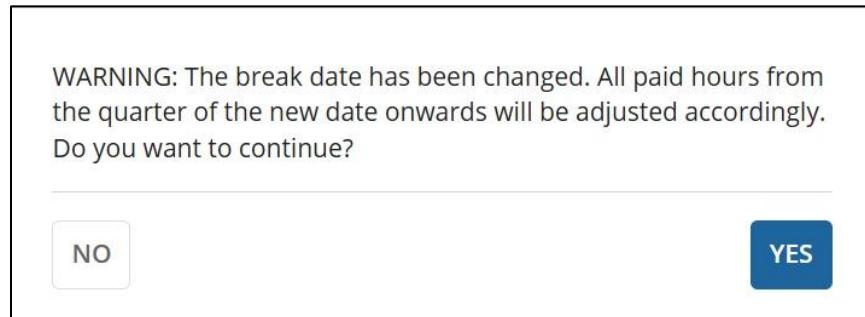
- a. Break start dates may not be later than the end of the assignment end date. An error message is displayed if the start date of the break does not meet this requirement.



The form titled 'Break in Service Details' contains the following fields:

- Assignment \***: A dropdown menu showing '01/01/2020 -'.
- Approved Break Start Date \***: A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Expected End Date**: A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Actual End Date**: A date input field with a calendar icon, showing 'mm/dd/yyyy'.
- Reason for Approved Break in Participation? \***: A list of radio buttons for 'Family/health', 'Personal', 'Administrative', 'Right of Return', and 'Other'.
- Comments**: A text area with placeholder text '0 / 2000'.
- Is Documentation Provided?**: A list of radio buttons for 'Yes' and 'No'.

- b. If Paid Hours have been entered for the participant and you attempt to add a Break that overlaps these previously entered Paid Hours, you will see a warning pop-up telling you those hours will be adjusted.



- c. For an Active participant, the status changes to *Active-On Break* when a break record is entered, and no **Actual End Date** has been entered.



A horizontal status dropdown menu with the following options: Pending, Pending Eligibility Approval, Eligible, **Active - On Break** (highlighted with a red box), Pending Recertification, Exited - In Follow-Up, Exited - Closed, and Locked.

- 3. When entering a break for a participant in *Exited-Closed* or *Exited-In Follow-Up* status, the **Actual End Date** is required before the break can be saved. For a participant in *Active* status, **Actual End Date** is optional when creating the break but must be entered before the assignment can be ended or an exit is entered.
- 4. A break cannot be added to a case that was exited, with the reason for exit of Durational Limit. To enter a missing break, the exit must first be deleted before adding the break.



The table has the following columns: Assignment Details, Approved Breaks, Training and Services. The 'Approved Breaks' column is highlighted with a red box.

Assignment Details	Approved Breaks	Training and Services																					
	<table border="1"> <thead> <tr> <th colspan="7">Approved Breaks</th> </tr> <tr> <th>Break ID</th> <th>Start Date</th> <th>Expected End Date</th> <th>Actual End Date</th> <th>Reason for Approved Break</th> <th>Is Documentation Provided?</th> <th>Comments</th> </tr> </thead> <tbody> <tr> <td>9503419</td> <td>05/01/2024</td> <td>05/10/2024</td> <td>05/10/2024</td> <td>Family/health</td> <td>Yes</td> <td></td> </tr> </tbody> </table>	Approved Breaks							Break ID	Start Date	Expected End Date	Actual End Date	Reason for Approved Break	Is Documentation Provided?	Comments	9503419	05/01/2024	05/10/2024	05/10/2024	Family/health	Yes		
Approved Breaks																							
Break ID	Start Date	Expected End Date	Actual End Date	Reason for Approved Break	Is Documentation Provided?	Comments																	
9503419	05/01/2024	05/10/2024	05/10/2024	Family/health	Yes																		

- 5. To verify and edit approved breaks, click **Approved Breaks**.
- 6. Click the **Break ID** (which is formatted as hyperlinked text) to display the *Break in Services* details screen.

7. Click **Edit** to modify the details of the break record.
8. 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.

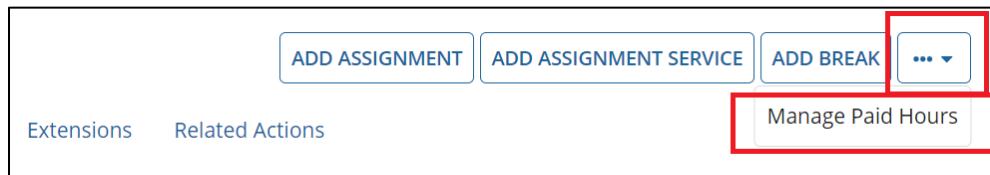
1. Click **Assignments**.
2. Click **Approved Breaks**.
3. Click the **Delete Break** icon.

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. If you enter more than 325 hours for a quarter for one Assignment, you will see a warning which reads "Total hours paid in Q[X] exceeds 325. This may contribute to a program year's total of more than 1,300 hours." while still allowing you to save the entry. The system will not allow you to enter more than 560 hours in one quarter or an amount exceeding three digits in the Manage Paid Hours module. 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.

Manage Paid Hours						
Program Year	2025	Participant Name	Participant ID	Assignment ID	Host Agency Name	Assignment Start Date
		Test-Participant-004: SCSEP 5002	10036358	10968229	SQL Code Shop	1/1/2024
Type	Q1	Q2	Q3	Q4	Program Year	
PRA Activities					2025	
Paid Training (In Person)						
Paid Training (Remote)						
Paid CSA (In Person)	20				20	
Paid CSA (Remote)						
Paid Sick Leave						
Total Hours	20					

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

5. If a participant has an approved break which spans an entire quarter, hours may only be entered into the PRA activities and Paid Sick Leave categories.

Total Hours	Q1	Q2	Q3	Q4
PRA Activities				
Paid Training (In Person)				
Paid Training (Remote)				
Paid CSA (In Person)				
Paid CSA (Remote)				
Paid Sick Leave				
Total Hours	0	0	0	0

## 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.

Summary
Assignments
Participant Required Actions
Participant History
Extensions
Related Actions

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

**Participant Summary**

Participant Name	Participant ID	State	Case ID
Dennis Brownfield	CMS010013054	Vermont	10879664
Grant Number	Age	County	Enrollment Date
AD383152260A50	55	Rutland County	07/06/2023

**Is Re-Enrolled**

No

Orientation

Offer Of Physical Exam

Participant Safety Consultation

Assessment and Re-assessment/IEP

Annual Program Overview

## 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.

**Orientation Details**

Instructions

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

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

Save
Delete

- 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

Orientation

Offer Of Physical Exam

Participant Safety Consultation

Assessment and Re-assessment/IEP

Annual Program Overview

**Physical Exam Details**

Instructions

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

Date of Offer of Physical Exam * <small>DD/MM/YYYY</small>	Declined Offer of Physical Exam * <small>Yes/No</small>	Provided By * <small>Employee Name</small>
09/07/2023	<input type="radio"/> Yes <input type="radio"/> No	Mary Ellis

Add New
Edit
Delete

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.

- Click the **Save** icon to save the data.
- Click the **Delete** icon to delete the data.

## 6.3 Safety Consultation Details

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

### Participant Safety Consultation

Instructions

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

Participant Safety Consultation Date *	Provided By *	
09/07/2023	Mary Ellis	 



To add safety consultation details for a participant:

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

### Participant Safety Consultation

Instructions

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

Participant Safety Consultation Date *	Provided By *	
08/23/2023	Amy Kelly	 

## 6.4 Assessment Details

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

### Assessment/IEP Details

Instructions

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

Assessment (Re-assessment) Date * 	Supportive Services Needed? * 	Transition Planning 	IEP Date 	Provided By * 	
09/07/2023	<input type="radio"/> Yes <input checked="" type="radio"/> No		09/07/2023	Mary Ellis	 
08/30/2023	<input type="radio"/> Yes <input checked="" type="radio"/> No		08/30/2023	Mary Ellis	 



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.

Participant Summary			
Participant Name	Participant ID	State	Case ID
Dennis Brownfield	CMS010013054	Vermont	10879664
Grant Number	Age	County	Enrollment Date
AD383152260A50	55	Rutland County	07/06/2023
Is Re-Enrolled			
No			
Orientation   Offer Of Physical Exam   Participant Safety Consultation   Assessment and Re-assessment/IEP   <b>Annual Program Overview</b>			
Annual Program Overview			
Description	Date	Updated by	
No items available			
<a href="#">Add New</a>			

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.

## leila userguide recert (Case ID: 10886805)

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

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

### Participant History

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

### Assignment History

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

### Break History

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

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 unique ID for the Host Agency

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:** The unique identifier for the employer
3. **Start Date**
4. **End Date**
5. **Placement ID:** The unique identifier for the placement record

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
<b>Edit case</b>	X	X	X	X	X	X		X		X	X
<b>Withdrawn</b>	X	X	X		X			X			
<b>Add to waitlist</b>			X								
<b>Manage physical exam</b>						X					
<b>Manage paid hours</b>						X	X			X	X
<b>Move case</b>						X	X				
<b>Transfer case</b>						X	X				
<b>Add participant required action</b>						X				X	X
<b>Recertify case</b>						X	X				
<b>Manage program introduction</b>			X				X				
<b>Manage assignments</b>						X		X		X	X
<b>Add assignment service</b>						X					X
<b>Manage training and services</b>						X					X
<b>Manage breaks in service</b>						X					X
<b>Manage waiver factors</b>	X	X	X			X	X			X	X
<b>Manage extensions</b>					X		X	X			
<b>Add exit</b>							X	X			
<b>Modify exit</b>										X	X
<b>Manage / Add placements / Add placement service</b>											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.

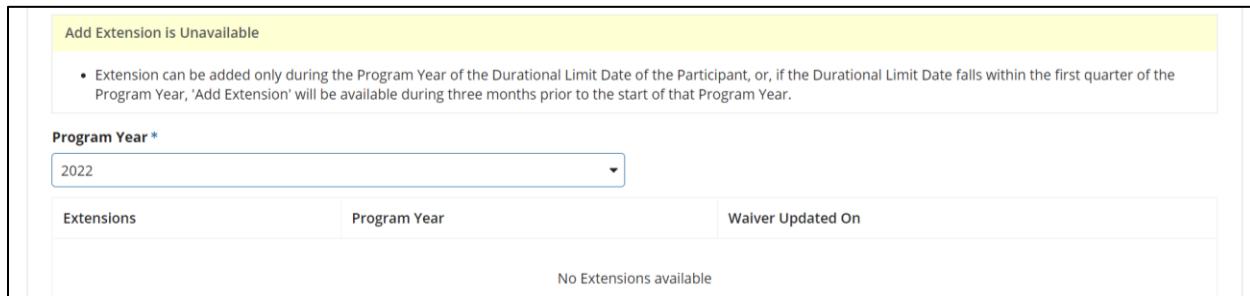
Summary	Assignments	Participant Required Actions	Participant History	Extensions	<b>Related Actions</b>
<h3>Manage Waiver Factors</h3>					
Pending	Pending Eligibility Approval	Eligible	Active	Exited - In Follow-Up	Exited - Closed
<b>Participant Summary</b>					
Participant Name	Participant ID	State	Case ID		
leila userguide recent	CMS010019646	American Samoa	10886805		
Grant Number	Age	County	Enrollment Date		
24A60AD000206	74	Eastern District	11/22/2022		
Is Re-Enrolled					
No					
Program Year					
2024					

### Waiver Factors for Program Year 2024

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

## 8.2 Manage Extensions

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



Add Extension is Unavailable

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

Extensions	Program Year	Waiver Updated On
No Extensions available		

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, an **Add** button 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:



### Exit Information

Termination Letter date <small>?</small>
mm/dd/yyyy
<b>Category of Exit *</b>
Unsubsidized Employment
<b>Unsubsidized Employment Type *</b>
<input type="radio"/> Regular Employment
<input type="radio"/> Self-Employment

- **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.

**Waiver Certification**

**Waiver of Confidentiality \***

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

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

**CANCEL EXIT**

**SUBMIT AND ADD PLACEMENT**

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.

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

**Related Actions**

- [Add Assignment Service](#)
- [Add Placement](#)
- [Add Placement Service](#)
- [Add Break](#)
- [Manage Waiver Factors](#)
- [Modify Exit](#)
- [Manage Paid Hours](#)

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**.

**Waiver Certification**

**Waiver of Confidentiality\***

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

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

[CANCEL EXIT](#) **SUBMIT AND CLOSE**

## 8.4 Add Placement

This section is for adding 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**:

<b>Start Date*</b> <input type="text" value="mm/dd/yyyy"/>	<b>Self Employed?*</b> <input type="radio"/> Yes <input type="radio"/> No	<b>Host Agency Employer?</b> <input type="radio"/> Yes <input type="radio"/> No
<b>End Date</b> <input type="text" value="mm/dd/yyyy"/>	<b>Employer*</b> <input type="text"/>	
<b>Site Name and Location</b> <input type="text"/>	<b>Job Title</b> <input type="text"/>	<b>Starting Wage per Hour</b> <input type="text"/>

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.

<b>Supervisor</b> <input type="text" value="-- Select a supervisor --"/>	<b>Job Code*</b> <input type="text" value="-- Select a job code --"/>	<b>Type of Placement*</b> <input type="radio"/> Full-time <input type="radio"/> Part-time
<b>Was Placement result of a Substantial Service Provided to Employer by Sub-Grantee?*</b> <input type="radio"/> Yes <input type="radio"/> No	<b>Comments</b> <input style="height: 100px; width: 100%;" type="text"/>	<b>Benefits</b> <input type="checkbox"/> Health Insurance <input type="checkbox"/> Sick Leave <input type="checkbox"/> Pension / Profit Sharing <input type="checkbox"/> Vacation <input type="checkbox"/> Transportation <input type="checkbox"/> Room and board <input type="checkbox"/> Other <input type="checkbox"/> None
<b>Did employer provide an OJE training site?*</b> <input type="radio"/> Yes <input type="radio"/> No	0 / 2000	Check all that apply. If "None" is selected, you cannot select any other value.
<b>Training-related Placement?</b> <input type="radio"/> Yes <input type="radio"/> No		

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

Follow-Up 1 Date

...

Follow-Up 1 Notes

0 / 2000

Any wages for second quarter after exit quarter?

 Yes  
 No

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

Follow-Up 2 Date

...

Follow-Up 2 Notes

0 / 2000

Earnings for the Second Quarter After the Exit Quarter?

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

Follow-Up 3 Date

...

Follow-Up 3 Notes

0 / 2000

CANCEL PLACEMENT

SUBMIT PLACEMENT

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

Pending	Pending Eligibility Approval	Eligible	Active	Pending Recertification	Exited - In Follow-Up	Exited - Closed	Locked
<b>Participant Summary</b>							
Participant Name	Participant ID	State	Case ID				
Georgina Jones	CMS010005580	New Jersey	10869109				
<b>Placements</b>							
Placement ID	Employer	Start Date	Job Title	End Date	Starting Wage per Hour		
13329600	Franklin Park Tech Center	02/02/2022	Programmer		\$20.00		<span style="color: red;">X</span>

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**.



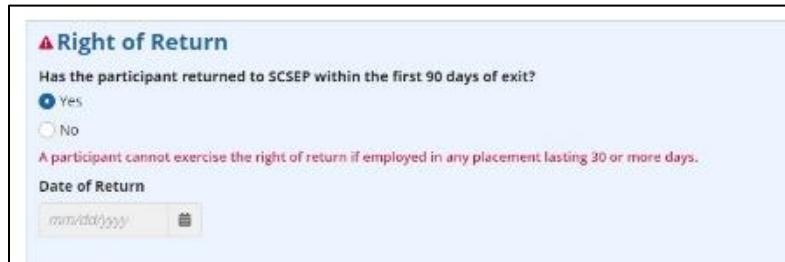
Right of Return

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

Date of Return

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.
    - i. 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:



Right of Return

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

Yes

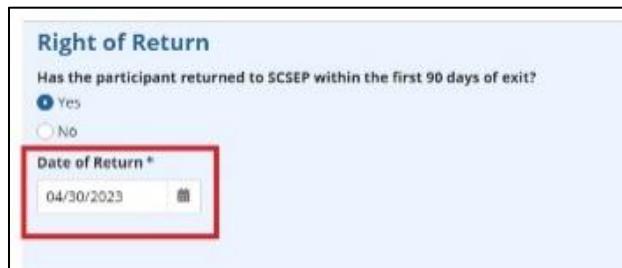
No

A participant cannot exercise the right of return if employed in any placement lasting 30 or more days.

Date of Return

mm/dd/yyyy

- ii. 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:



Right of Return

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

Yes

No

Date of Return \*

04/30/2023

- 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
<b>Participant Summary</b>							
Participant Name Samantha Smith	Participant ID CMS010018533	Age 73	State New Jersey	Case ID 10885356	County Somerset County	Enrollment Date 01/01/2023	
Grant Number AD382882260A35							
Is Re-Enrolled No							
<b>Participant History</b>							
Case Id 10885356	Grantee New Mexico	Sub-Grantee SCSEP - New Mexico	Application Date 01/01/2023	Status Active	Exit Date		
<b>Assignment History</b>							
Assignment ID 10932695	Assignment Date 01/01/2023	Assignment End Date 02/01/2023	Host Agency SQL Code Shop	Host Agency ID 10601994			
<b>Placement History</b>							
Employer Name Code Breakers	Employer ID 10602014	Start Date 02/01/2023	End Date 04/30/2023	Placement ID 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.

**Break in Service Details**

<p><b>Assignment *</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">01/01/2023 - 04/29/2023</div>	<p><b>Reason for Approved Break in Participation? *</b></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="radio"/> Family/health  <input type="radio"/> Personal  <input type="radio"/> Administrative  <input checked="" type="radio"/> Right of Return  <input type="radio"/> Other         </div> </div>
<p><b>Approved Break Start Date *</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">02/02/2023</div>	
<p><b>Expected End Date</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">mm/dd/yyyy</div>	
<p><b>Actual End Date</b></p> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">04/29/2023</div>	
<p><b>Is Documentation Provided?</b></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input checked="" type="radio"/> Yes  <input type="radio"/> No         </div> <div style="width: 45%; text-align: right;">74 / 2000</div> </div>	
<p><b>Comments</b></p> <div style="border: 1px solid #ccc; padding: 5px; height: 40px; min-height: 40px; margin-top: 5px;">           Participant exited for p/t employment at Code Breakers, <u>starting</u> 2/1/2023.         </div>	

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 **Edit**.

**Follow Up Details**

<p>Follow-Up 1 (7/1/2022 - 9/30/2023)</p> <p>Follow-Up 1 Date</p> <p>Any wages for second quarter after exit quarter?</p>	<input type="button" value="Edit"/>
---	-------------------------------------

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:

**Follow Up Details**

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

Follow-Up 1 Date  Dates generated by system.

Any wages for second quarter after exit quarter?  
 Yes  
 No

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

Follow-Up 2 Date

Earnings for the Second Quarter After the Exit Quarter?

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

Follow-Up 3 Date

Any wages for fourth quarter after exit quarter?  
 Yes  
 No

**Follow-Up 1 Notes**

Active Field

**Follow-Up 2 Notes**

Inactive Field

**Follow-Up 3 Notes**

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

**Follow Up Details**

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

Follow-Up 1 Date

Any wages for second quarter after exit quarter?  
 Yes  
 No

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

Follow-Up 2 Date

Earnings for the Second Quarter After the Exit Quarter?

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

Follow-Up 3 Date

Any wages for fourth quarter after exit quarter?  
 Yes  
 No

**Follow-Up 1 Notes**

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

**Follow-Up 2 Notes**

Georgina continues to do well with this placement.

**Follow-Up 3 Notes**

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

## 11. Add Placement-Related Service

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

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.

### General Details

Placement \*

Category \*  Type \*

### Service Details

Start Date \*  Expected End Date  Actual End Date

Is this a One Day Service? \*  Yes  No

Comments  
  
0 / 2000

### Additional Fields

Provider

State  City  Organization Name

3. If the user selects **Referrals** in the **Type** dropdown, separate fields will appear on screen specific to referral follow-up services.

### General Details

Placement \*

Category \*  Type \*  Sub-Category \*

### Referral Details

Initial Date  Follow-Up Date  Reason

Follow-Up Successful  Yes  No

Follow-Up Completed

Referral Outcome

4. For a follow-up referral, if Yes is selected for the **Follow-Up Successful** field, additional service detail and provider fields will appear.

**Service Details**

**Start Date\***

/

**Expected End Date**

/

**Actual End Date**

/

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

Yes  No

**Comments**

Type comments here

0 / 2000

**Additional Fields**

**Provider**

**State**

**City**

**Organization Name**

5. Once the user is done with the follow-up services page, 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**

**\* Sub-Grantee**

**\* Grant**

**\* Case Assigned To**

**\* Movement Effective Date**

/

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

1. The **Grantee** field is filled by default.

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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.

### Discretionary Transfer Request

**Participant Information**

Participant First Name	Grant Name	Participant Last Name
		Lore

**Case Transfer Details**

<p><b>Donor Organization</b></p> <input type="text" value="National Older Workers Association (NOWA)"/>	<p><b>Recipient Grantee *</b></p> <input type="text" value="Start typing Grantee's Name to pick from available options"/>
<p><b>Transfer Initiator *</b></p> <input type="radio"/> Grantee <input type="radio"/> Participant	
<p><b>Reason For Transfer *</b></p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%;"> <small>... Please select a value ...</small> </div>	
<p><b>Requested Effective Date *</b></p> <div style="display: flex; align-items: center;"> <input style="width: 150px; height: 30px; border: 1px solid #ccc; margin-right: 10px; padding: 2px 5px;" type="text"/> mm/dd/yyyy           <span style="font-size: 1.5em; border: 1px solid #ccc; padding: 0 5px; border-radius: 50%; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">CALENDAR</span> </div>	

Comment

**Donor Certification \***

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

CANCEL
SUBMIT

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

- Total Includable Family Income**
- Signature of Participant on Recertification**
- Signature of Director or Authorized Representative on Recertification**

3. The instructions for the **Total Includable Family Income** field are as follows:

- For the **12-month period**: “Total includable family income during the 12-month eligibility determination period.”
- For the **6-month period**: “Total includable family income during the 6-month eligibility determination period, annualized.”

4. **Save + Continue:**

- 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**.
- 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.

System Eligibility Determination: Eligible
<b>Reasons for Eligibility</b> <ul style="list-style-type: none"><li>• The participant is Unemployed.</li><li>• The participant's income is at or below 125% Poverty Level.</li><li>• The participant's age is within the allowed range.</li></ul>
<b>Recertification Eligibility Determination</b> <b>SCSEP Eligible? *</b> <input type="radio"/> Yes <input type="radio"/> No

6. Choose an option for **SCSEP Eligible**.

- If **No** is selected:
  - Select at least one checkbox under **Reason for Ineligibility** and an **Action Taken if Ineligible**.

ii. Provide an explanation in the **Comment** field.

<b>Reason for Ineligibility*</b> <input type="checkbox"/> Age <input type="checkbox"/> Residence outside of state <input type="checkbox"/> Income <input type="checkbox"/> Failed to complete Recertification <input type="checkbox"/> Other	<b>Action Taken if Ineligible*</b> <input type="checkbox"/> Referred to One-Stop <input type="checkbox"/> Referred to Social Services <input type="checkbox"/> Referred to another project <input type="checkbox"/> Placed in unsubsidized employment pursuant to MOU <input type="checkbox"/> Other
---	---

b. If Yes is selected: Space is provided to add an optional **Comment**. 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)"

## leila recert2 (Case ID: 10886809)

APPROVE RECERTIFICATION

Summary Assignments Participant Required Actions Participant History Extensions Related Actions

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

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

### Participant Summary

<b>Participant Name</b> leila recert2	<b>Participant ID</b> CMS010019650	<b>Month(s) in Program</b> 24 months, 1 days
<b>Primary Phone</b> (555) 555-1212	<b>Age</b> 74	
<b>Durational Limit Date</b> 11/25/2026	<b>Day(s) Left in Program</b> 730	
<b>Recertification Date</b> 11/26/2024 (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."

### Participant Summary

<b>Participant Name</b> leila recert ineligible 1	<b>Participant ID</b> CMS010019651	<b>State</b> Arizona	<b>Case ID</b> 10886810
<b>Status</b> Active	<b>Age</b> 74	<b>County</b> Coconino County	<b>Enrollment Date</b> 11/26/2022
<b>Grant Number</b> 24A60AD000198			
<b>Is Re-Enrolled</b> No			

 A recertification dated 11/26/2024 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:

All Tasks and Notifications for Edmasup Denk								
Case Tasks								
All Tasks		Past Due		Due Soon		Upcoming		Escalated
Participant Name	Participant ID	Case ID	Case Status	Task Type	Escalated?	Due Date	Status	Description
Recent Example	10018534	10885357	Pending Recertification	Recertification	—	12/27/2023		Please review the recertification request before: 12/27/2023

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.

**Eligibility Determination**

SCSEP Eligible?

Yes

No

Reason for Ineligibility \*

Age

Residence outside of state

Employed

Income

Failed to file complete Application

Other

Action Taken if Ineligible \*

Referred to One-Stop

Referred to Social Services

Referred to another project

Placed in unsubsidized employment pursuant to MOU

Other

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

**Authorization**

Click the checkbox to authorize \*

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

## 14. Manage Program Introduction

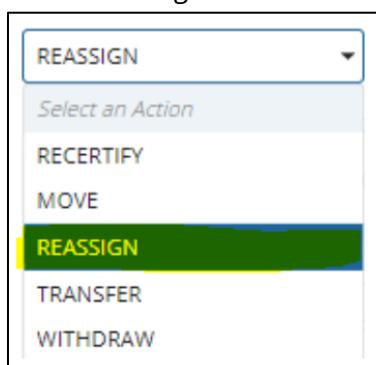
In this section, **Program Introduction** is managed by editing the **Pre-Assessment Date** and **Program Overview Date**. Click **Save** to save the changes.

<b>Participant Summary</b>			
Participant Name Grant Lore	Participant ID CMS010005586	State New Jersey	Case ID 10869115
Status Active	Age 73	County Somerset County	Enrollment Date 01/01/2020
Grant Number AD37226216001			
<b>Program Introduction</b>			
<b>Pre-Assessment Date *</b> 01/01/2020 <input type="button" value=""/>	<b>Program Overview Date *</b> 01/01/2020 <input type="button" value=""/>	<input type="button" value="CANCEL"/> <input type="button" value="SAVE"/>	

## 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.

**Reassign Cases**

**Selected Cases**

Case ID	Participant Name	Participant ID	Sub-Grantee	Case Assigned To	Date of Enrollment	Exit Date	Months in Program	Status
10790029	Alyce Weber	9969329	WR35 SER National Wt. 5 Fond Du Lac	Juanita McClelland	01/05/2018	01/29/2018	25	Exited - in Follow-Up

**Case Assigned To:**

Patrice Lewis

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.

**Admin Console**

1. Manage Grants	2. Manage Users	3. Manage Authorized Positions
4. Participant Search	5. Participant Waitlist	6. Participants Waiver Factor
7. Manage Organizations and Contacts	8. Manage Paid Hours	9. Durational Limit Extension Utility
10. Extracts	11. Generate WIPS QPR	12. Generate Internal QPR Reports
13. Generate WIPS QPR Addendum	14. Manage Eligibility Task Assignment	15. View Frozen QPR Report
16. Nationwide QPR Report		

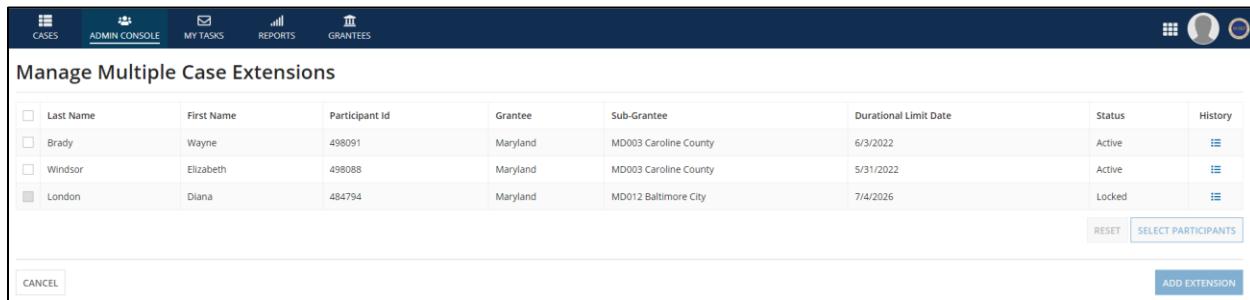
## 1. Durational Limit Extension Utility

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.

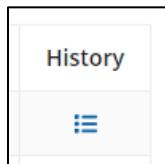
Participants who exceeded their durational limit and are now locked in the system will be listed in the utility but will need to have their records unlocked before an extension can be added.

Grantee Administrators can add an extension:



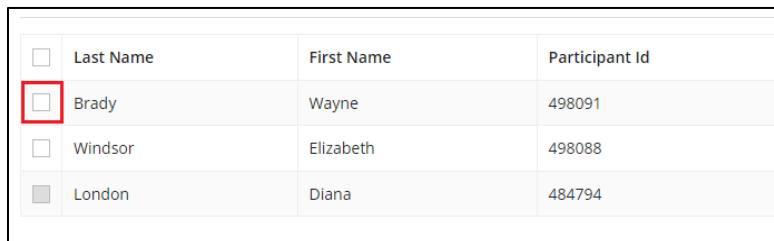
Last Name	First Name	Participant Id	Grantee	Sub-Grantee	Durational Limit Date	Status	History
Brady	Wayne	498091	Maryland	MD003 Caroline County	6/3/2022	Active	
Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	
London	Diana	484794	Maryland	MD012 Baltimore City	7/4/2026	Locked	

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



Severe Disability	4/14/2022	Old Enough but Not Receiving SS Title I	4/14/2022	Limited English Proficiency
Frail	4/14/2022	Severely Limited Employment Prospects	4/14/2022	Low Literacy Status
75 or Older	X	Formerly Incarcerated		

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

- 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
<input type="checkbox"/> Brady	Wayne	498091
<input type="checkbox"/> Windsor	Elizabeth	498088
<input disabled="" type="checkbox"/> London	Diana	484794

- 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
<input checked="" type="checkbox"/> Brady	Wayne	498091	Maryland	MD003 Caroline County	6/3/2022	Active	
<input type="checkbox"/> Windsor	Elizabeth	498088	Maryland	MD003 Caroline County	5/31/2022	Active	
<input disabled="" type="checkbox"/> London	Diana	484794	Maryland	MD012 Baltimore City	7/14/2026	Locked	

**RESET** **SELECT PARTICIPANTS** **ADD EXTENSION**

**CANCEL**

- Once at least one participant is selected, the **Reset** and **Select Participants** buttons will no longer be grayed out and can be clicked.
  - Click **Reset** to clear all checkboxes.
  - Click **Select Participants** to view the Certification of Extension Request.
  - Click **Cancel** to return to the previous screen. Information entered in the fields on the screen is not saved.
- Check the **Certification of Extension Request** checkbox and enter the name of the approver.
- Press **Enter** on the keyboard or click anywhere on the screen to activate the **Add Extension** button.
- 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.

- To find the grant to update, select the **Program Year** associated with the grant.

- Click on the **Grant Number** hyperlink. The *Edit Grant* screen will appear.

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

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

Linked Sub-Grantees				
Select an Action	SUBMIT			
Grant Access Grid				
<input type="checkbox"/> Sub-Grantee	Sub-Grantee Code	State	Organization Type	Sub-Grantee Status
<input type="checkbox"/> NOWA (California)	12347		Sub-Grantee	Active; Active; Active
<input type="checkbox"/> NOWA (New Jersey)	12346		Sub-Grantee	Active; Active; Active

## 2.1 Associate Sub-Grantees to Grant

- 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.
- To search for a sub-grantee not currently linked, click **Add New ( + )** under the **Selected Sub-Grantees** grid.
- 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.

Selected Sub-Grantees				
Sub-Grantee	Sub-Grantee Code	State	County of Residence	Sub-Grantee Status
<input type="text" value="a"/>				<input type="button" value="X"/>
NOWA (California)				<input type="button" value="X"/>
NOWA (New Jersey)				<input type="button" value="X"/>
NOWA (Puerto Rico)				<input type="button" value="X"/>
<input type="button" value="CANCEL"/>	<input type="button" value="SUBMIT"/>			

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

- Click on one of the buttons on the screen to perform the next action.
  - The red **X** on the right-hand side of the grid removes the sub-grantee from the list.
  - Cancel** opens a pop-up window to confirm the cancellation.
    - Click **No** to return to the screen.

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

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 list.
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 Users

This section covers user management for grantees and sub-grantees.

### 3.1 Add User

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

**User Organizations**

<b>Grantee *</b>	<b>Sub-Grantee *</b>
National Older Workers Association (NOWA)	NOWA (California)
<input type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="CANCEL"/> <span style="float: right;"><input type="button" value="SUBMIT"/></span>	

2. Click **Submit**. The *User Management* screen will appear.
3. Select **Add User**. Enter the information into the fields on the screen.
4. Acknowledge the agreement.
5. 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.

## 3.4 View User Roles and Status

To view user roles and status:

1. Enter part of the user's name or username.

Users status					
Name	Username	User Type	User Status	User Status	
Name	Username	User Type	User Status	User Status	
Bray Jeffrey	frontdesk3@nicoa.org	External User	Inactive	System Deactivated	
Buford Judith	jbuford@wsurban.org	External User	Active		
Case Donna	donnacl@esgw.org	External User	Inactive	System Deactivated	
Jean-Baptiste Bidley	bidley.jeanbaptiste@phila.gov	External User	Active		
King Idamae	iking@goodwillsandusky.org	External User	Active		
Long Debra	dlong@mnvac.org	External User	Inactive	System Deactivated	

2. Select the user from the **Name** column of the displayed list to see the user's roles.

## 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.

**Grantee Selection**

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

**Search Organizations**

Organization Name	Organization Code
California	420
Georgia	480

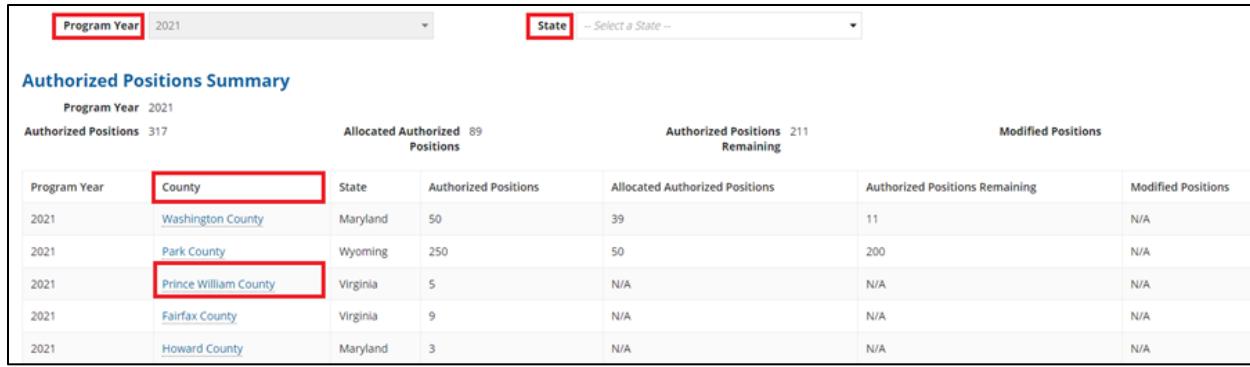
**User Organizations**

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



Program Year	2021	State	Select a State
Authorized Positions Summary			
Program Year	2021	Allocated Authorized Positions	89
Authorized Positions	317	Authorized Positions Remaining	211
Program Year	County	State	Authorized Positions
2021	<a href="#">Washington County</a>	Maryland	50
2021	<a href="#">Park County</a>	Wyoming	250
2021	<a href="#">Prince William County</a>	Virginia	5
2021	<a href="#">Fairfax County</a>	Virginia	9
2021	<a href="#">Howard County</a>	Maryland	3

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

Clicking on the hyperlinked county text will navigate you 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

**Authorized Positions Allocation**

**Authorized Positions Summary**

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

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

**Allocated Authorized Positions**

Sub-Grantee Name	Allocated Authorized Positions	Modified Positions
Start typing Sub-Grantee's Name to pick from available options		N/A

**Add New Allocation**

**CANCEL** **SAVE + CONTINUE** **SAVE + CLOSE**

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

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

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.

**Allocated Authorized Positions**

Sub-Grantee Name
S
Swap Sub #1
Swap Sub #2
Swap Test #1

**CANCEL**

The following text appears above the table heading:

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

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

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

**Authorized Positions Summary**

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

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

**Allocated Authorized Positions**

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

**Add New Allocation**

**CANCEL** **SAVE + CONTINUE** **SAVE + CLOSE**

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 redirects 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
<b>Program Analyst &amp; Read-only Global</b>	All grantees and their sub-grantees/States
<b>Grantee Administrator &amp; Read-only Grant</b>	Grantee specific to their access + all sub-grantees/States in that grant
<b>Sub-Grantee Administrator, Supervisor, Case Manager</b>	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.



# Generate Internal QPR Reports

Instructions

Year\*  Quarter\*

Grantee\*  Sub-Grantee  State

**CANCEL** **EXPORT**

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.

### Internal QPR Report Generation Status

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

**CONFIRM**

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.

Hello,

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

[PY 2023 Qtr 1 Performance Report for SCSEP](#)

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

Thank you.

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

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.

### 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	

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, only the PRA Activities and Paid Sick Leave hours can be entered). Quarters after a participant has 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. You can select among three Data Entry Types when searching: *By Quarter*, *By Assignment*, or *By Type*. The system default selection will be *By Quarter*.

**Data Entry Type**

By Quarter  By Assignment  By Type

**Total Hours Paid By Quarter**

**Participant Name**

Search by Participant Name

Current Selection: Q1  Q2  Q3  Q4

Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	PRA Activities	Paid Training (In Person)	Paid Training (Remote)	Paid CSA (In Person)	Paid CSA (Remote)	Paid Sick Leave	Total
------------------	----------------	------------------	-----------------------	---------------------	----------------	---------------------------	------------------------	----------------------	-------------------	-----------------	-------

**Data Entry Type**

By Quarter  By Assignment  By Type

**Total Hours Paid By Assignment**

Search Participant Id or Participant Name

Participant Name	Participant ID	Host Agency	Assignment Start Date	Assignment End Date	Program Year
Bearson, Ron	10031107	Greater Dwight Development Corp.	5/2/2025	7/1/2025	2024

**Data Entry Type**

By Quarter  By Assignment  By Type

**Total Hours Paid By Type**

**Participant Name**

Search by Participant Name

Current Type: PRA Activities  Paid Training (In Person)  Paid Training (Remote)  Paid CSA (In Person)  Paid CSA (Remote)  Paid Sick Leave

Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	Q1	Q2	Q3	Q4	Total
Ron Bearson	10031107	Greater Dwight Development Corp.	5/2/2025	7/1/2025					0

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

**Optional Filters**

<p>Status</p> <p>Active</p>	<p>Participant ID</p> <p>Participant Name <input type="text"/></p>
<p>Case Assigned To</p> <p>Michael Pulido</p>	<p>Host Agency</p> <p>Organization Name <input type="text"/></p>
<p>Enrollment</p> <p>From <input type="text"/> To <input type="text"/></p>	<p>Exit</p> <p>From <input type="text"/> To <input type="text"/></p>

6. Participants will be displayed in the table after you make a Data Entry Type selection. The table can be narrowed by entering a Participant ID or Participant Name in the text field and then clicking **Search**.

**Total Hours Paid By Assignment**

Search Participant Id or Participant Name

7. If you have searched by using Data Entry Type *By Assignment*, then select which participant you wish to update by selecting **Edit** next to their name in the table.

**Total Hours Paid By Assignment**

Participant Name	Participant ID	Host Agency	Assignment Start Date	Assignment End Date	Program Year
Brassard, Raedelle	10006824	Project Site Office 012	1/17/2023	7/28/2024	2024
Brassard, Raedelle	10006824	Project Site Office 012	7/29/2024		2024

8. Depending on which Data Entry Type you have selected, once you have selected a participant, the entry screen will look slightly different.

- By Quarter* will allow you to enter all types of hours for one quarter.
- By Assignment* will allow you to enter all types of hours in one Assignment.
- By Type* will allow you to enter hours for all available quarters, but you must select the type of hours one at a time.

9. Enter the hours for each participant in the appropriate category. As the 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 By Quarter**

Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	PRA Activities	Paid Training (In Person)	Paid Training (Remote)	Paid CSA (In Person)	Paid CSA (Remote)	Paid Sick Leave	Total
Raedelle Brassard	10006824	Project Site Office 012	7/29/2024								0

## Manage Paid Hours

Program Year

2025

Participant Name	Participant ID	Assignment ID	Host Agency Name	Assignment Start Date	Assignment End Date	Program Year
Brassard, Raedelle	10006824	10952699	Project Site Office 012	7/29/2024		2025
Type	Q1	Q2	Q3	Q4	Total Hours	
PRA Activities						
Paid Training (In Person)						
Paid Training (Remote)						
Paid CSA (In Person)						

CLOSE

SUBMIT

### Data Entry Type

By Quarter

By Assignment

By Type

### Total Hours Paid By Type

Participant Name

brass

SEARCH

Current Type: PRA Activities Paid Training (In Person) Paid Training (Remote) Paid CSA (In Person) Paid CSA (Remote) Paid Sick Leave

Participant Name	Participant ID	Host Agency Name	Assignment Start Date	Assignment End Date	Q1	Q2	Q3	Q4	Total
Raedelle Brassard	10006824	Project Site Office 012	7/29/2024						0

10. If a participant has an approved break which spans an entire quarter, hours may only be entered into the PRA activities and Paid Sick Leave categories.

Total Hours	Q1	Q2	Q3	Q4
PRA Activities				
Paid Training (In Person)				
Paid Training (Remote)				
Paid CSA (In Person)				
Paid CSA (Remote)				
Paid Sick Leave				
Total Hours	0	0	0	0

11. 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.

Participants Waiver Factors		
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.



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

Participant Name Or Participant ID  OR Social Security Number

Program  Please select a value ...

Grantee  National Older Workers Association (NOWA)

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

|

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."

**Participant Waitlist**

Participant Name Or Participant ID [?](#)

Grantee: District of Columbia

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

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

**NOTES**

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

**EXPORT**

Case ID	Participant Name	Participant ID	Waitlist Date	Days On Waitlist
10908910	Earl Robinson	CMS010035905	3/7/2025	53
10908911	Scheri Benton	CMS010035906	3/7/2025	53
10908466	Marilyn Felton	CMS010035555	2/27/2025	61

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

The results of the Participant Waitlist Table can be downloaded by clicking **Export**.

## 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.

**Manage Organization and Contacts**

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

**Filters**

State \*: Select a State

City \*:

Organization Name \*:

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

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.

Agency Type	Organization Continued Availability
<input type="button" value="--- Please select a value ---"/> <input style="background-color: #0070C0; color: white; border: none;" type="button" value="--- Please select a value ---"/>	<input type="radio"/> Available <input type="radio"/> Not Available <span style="color: red;">X</span>
Host Agency Employer Service Provider	

- 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.

Agency Type	Organization Continued Availability
Host Agency <input type="button" value="--- Please select a value ---"/>	<input type="radio"/> Available <input type="radio"/> Not Available <span style="border: 2px solid red; padding: 2px;">X</span>
Employer <input type="button" value="--- Please select a value ---"/>	<input type="radio"/> Available <input type="radio"/> Not Available <span style="border: 2px solid red; padding: 2px;">X</span>

- 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

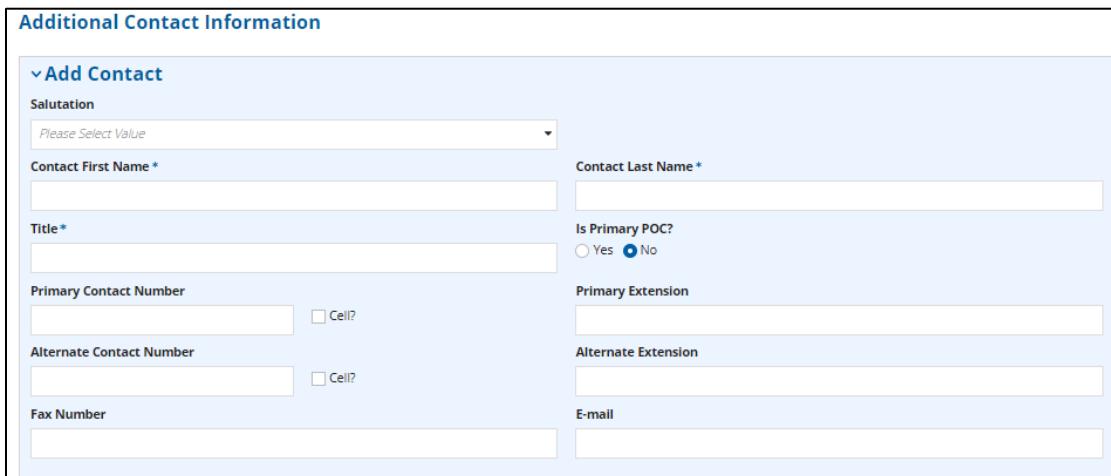
To edit an organization:

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*.



The screenshot shows a form titled 'Additional Contact Information' with a sub-section 'Add Contact'. The form fields include:

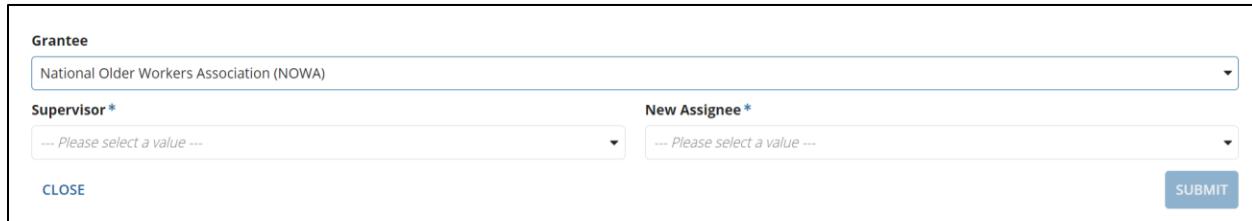
- Salutation: A dropdown menu with 'Please Select Value' as the placeholder.
- Contact First Name \*: A text input field.
- Contact Last Name \*: A text input field.
- Title \*: A text input field.
- Is Primary POC?: A radio button group with 'Yes' and 'No' options, where 'No' is selected.
- Primary Contact Number: A text input field.
- Primary Extension: A text input field.
- Alternate Contact Number: A text input field.
- Alternate Extension: A text input field.
- Fax Number: A text input field.
- E-mail: A text input field.
- Cell? checkboxes: Two checkboxes labeled 'Cell?' located next to the Primary and Alternate contact number fields.

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 screenshot shows a user interface for managing task assignments. At the top, there is a label 'Grantee' followed by a dropdown menu containing the text 'National Older Workers Association (NOWA)'. Below this are two more dropdown menus: 'Supervisor\*' and 'New Assignee\*'. Both of these dropdowns currently display the placeholder text '... Please select a value ...'. In the bottom right corner of the interface, there is a blue 'SUBMIT' button and a 'CLOSE' button in the bottom left corner.

- The **Supervisor** dropdown list is where you select the role you want to reassign tasks from.
- The **New Assignee** dropdown list is where you select the role you 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. If you wish to end the report process, select **End** and the system will return you to the *Extract Files* screen.

7. The *Download [extract type chosen] Extract* screen will appear with a linked extract file.

**Download Participant Extract**

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

Export File Exporting...  
(Last Refresh: 12/26/2025 11:02 AM EST)

REFRESH

EXIT

8. 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.

**Generate Nationwide QPR**



Instructions

Year \* 2024

Quarter \* 10/1/2024 - 12/31/2024

CANCEL EXPORT

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."

Nationwide QPR Report Generation Status

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

**CONFIRM**

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.

Your Nationwide QPR Report is ready

 admin@cmp.dol.gov on behalf of United States De To [REDACTED] 1:51 PM

Hello,

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

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

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

Thank you.

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

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 window 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.

The QPR is Generated Successfully

 admin@cmppreprod.dol.gov on behalf of United States Department of Lab  
To: Campbell, Katherine L - ETA CTR

... Reply Reply All Forward ...

Tue 10/29/2024 7:31 AM

**INFO ONLY:** This email originated outside the Department of Labor but from a validated government source. Do not click (select) links or open attachments unless you recognize the sender and know the content is safe. Report suspicious emails through the "Report Phishing" button on your email toolbar.

Hello,

PY2023 Q3 QPR is generated. Please go to Freeze QPR to view the generated QPR reports.

Thank you.

Note: Please do not reply. This message has been sent by a notification only system.

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."

 **Freeze QPR** - Selected year and quarter QPR report has been generated. [Click here to view the QPR report](#)

[Freeze QPR Report](#)

- 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.

**View Generated QPR**

Please select the Grantee (Optional: Sub-Grantee) you wish to view.

Year: 2023      Quarter: 7/1/2023 - 6/30/2024

Selected QPR: Internal (radio button selected)      Nationwide (radio button)

Grantee \*: Select a Grantee

Sub-Grantee: Select a Sub-Grantee

**GO BACK**      **VIEW GENERATED REPORT**

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

**View Generated QPR**

Year: 2023      Quarter: 7/1/2023 - 6/30/2024

Selected QPR: Internal (radio button)      Nationwide (radio button selected)

**GO BACK**      **VIEW GENERATED REPORT**

- 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."

**Freeze QPR - QPR is ready for download. [Click here to download the report.](#)**

**View Generated QPR**

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

**Freeze QPR Report**

Please select the program year and quarter to generate the QPR

Year\*: 2022      Quarter\*: 10/1/2022 - 12/31/2022

QPR\*: Internal (radio button selected)      Nationwide (radio button)

**CANCEL**      **GENERATE**      **FREEZE QPR REPORT**

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

The QPR is Frozen Successfully

 admin@cmppreprod.dol.gov on behalf of United States Department of Labor IT Platform <noreply@dol.gov>  
To: Campbell, Katherine L - ETA CTR

**INFO ONLY: This email originated outside the Department of Labor but from a validated government source. You can safely know the content is safe. Report suspicious emails through the "Report Phishing" button on your email to the U.S. Department of Labor.**

Hello,

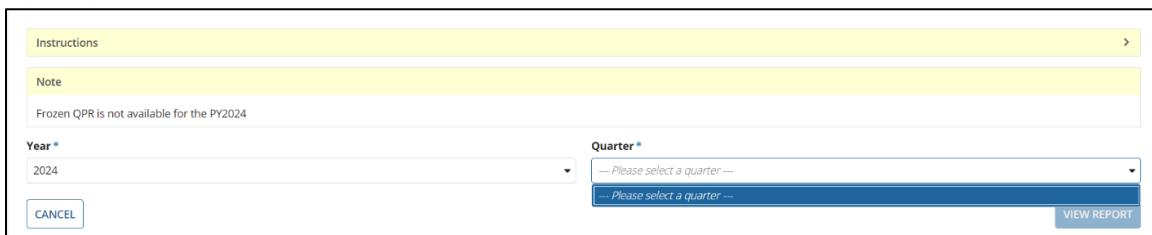
PY2023 Q3 QPR is now frozen. Please go to Freeze QPR to view the Freezed QPR reports.

Thank you.

Note: Please do not reply. This message has been sent by a notification only system.

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."



Instructions

Note

Frozen QPR is not available for the PY2024

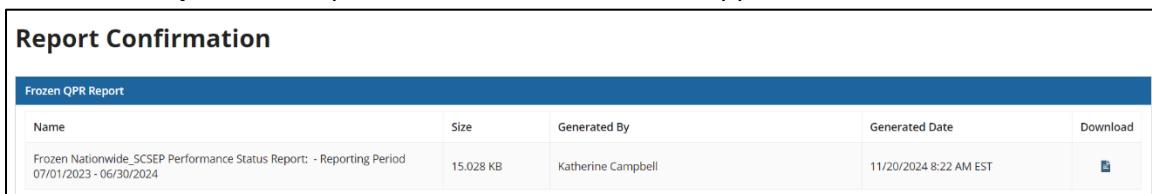
Year \*  
2024

Quarter \*  
... Please select a quarter ...  
... Please select a quarter ...

CANCEL

VIEW REPORT

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.



**Report Confirmation**

Frozen QPR Report				
Name	Size	Generated By	Generated Date	Download
Frozen Nationwide_SCSEP Performance Status Report: - Reporting Period 07/01/2023 - 06/30/2024	15.028 KB	Katherine Campbell	11/20/2024 8:22 AM EST	

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.

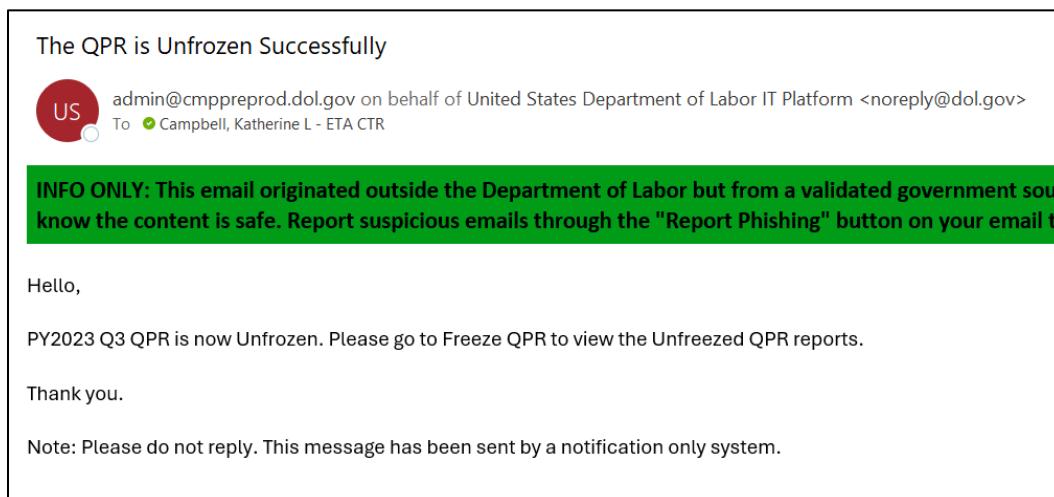
1. Select **Admin Console** from the main navigation bar.
2. Click **Freeze QPR Report**.
3. If you select a report period for **Year** and **Quarter** that has been frozen, the **Unfreeze QPR Report** button will appear and the **Generate** button will be grayed out.



A screenshot of a web-based application interface. At the top, there are two dropdown menus: 'Year' set to '2023' and 'Quarter' set to '7/1/2023 - 6/30/2024'. Below these is a 'CANCEL' button. To the right of the quarter dropdown are two buttons: 'GENERATE' (disabled and grayed out) and 'UNFREEZE QPR REPORT' (highlighted in blue).

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.



The QPR is Unfrozen Successfully

 admin@cmppreprod.dol.gov on behalf of United States Department of Labor IT Platform <noreply@dol.gov>  
To: Campbell, Katherine L - ETA CTR

**INFO ONLY: This email originated outside the Department of Labor but from a validated government source. You can safely open this email. If you have concerns, know the content is safe. Report suspicious emails through the "Report Phishing" button on your email to the IT Platform.**

Hello,

PY2023 Q3 QPR is now Unfrozen. Please go to Freeze QPR to view the Unfreezed QPR reports.

Thank you.

Note: Please do not reply. This message has been sent by a notification only system.

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

## 15. Generate WIPS QPR Addendum

The *Generate WIPS QPR Addendum* functionality allows you to generate a WIPS Quarterly Progress Report (QPR) Addendum. Availability of the WIPS QPR addendum is dependent on your access level and permissions, according to the following table:

GPMS role	WIPS QPRs available to generate
<b>Program Analyst &amp; Read-only Global</b>	All grantees and their sub-grantees
<b>Grantee Administrator &amp; Read-only Grant, Sub-Grantee Administrators</b>	Grantee specific to their access + all sub-grantees in that grant
<b>Supervisor, Case Manager</b>	These functions are not available for these users

To generate the WIP QPR addendum:

1. Log in as one of the authorized users.
2. Select **Admin Console** from the main navigation bar.
3. Click **Generate WIPS QPR Addendum**.
4. Select the **Grantee**.



Generate WIPS QPR Addendum

Select a Grantee to generate a QPR addendum

Grantee \*

—Select a Grantee—

National Council on the Aging  
New Mexico  
Oklahoma  
Vermont

- a. As a Grantee Administrator, the dropdown list displays only grantees associated with the user.
- b. As a Program Analyst, you will select from a search field in which you enter the name of the grantee you are searching for (until you can select a match).

- The screen will update to show all available sub-grantees under that grantee. All sub-grantees are selected for the report by default.

Select a Grantee to generate a QPR addendum

<b>Grantee *</b> <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="New Jersey"/>	<b>Sub-Grantee</b> <input checked="" type="checkbox"/> Atlantic City One-Stop Career Center <input checked="" type="checkbox"/> Camden County One-Stop Career Center <input checked="" type="checkbox"/> Cape May County One-Stop Center <input checked="" type="checkbox"/> Cumberland County One-Stop Center <input checked="" type="checkbox"/> Essex County Economic Development Center <input checked="" type="checkbox"/> Gloucester County One-Stop Career Center <input checked="" type="checkbox"/> Hudson County One-Stop Career Center <input checked="" type="checkbox"/> Middlesex County One-Stop Career Center <input checked="" type="checkbox"/> Monmouth County One-Stop Career Center <input checked="" type="checkbox"/> Sussex County One-Stop Career Center <input checked="" type="checkbox"/> Union County One-Stop Career Center
--	--

CANCEL
SUBMIT

- Clicking **Cancel** will return you to the Admin Console. Clicking **Submit** will navigate you to the next screen. Click **Submit**.
- On the next screen, the most recent program year and quarter is automatically selected.

## Generate WIPS QPR Addendum

Generate WIPS QPR Addendum for Program Year **2025** and Quarter **7/1/2025 - 9/30/2025**

CLOSE
GENERATE

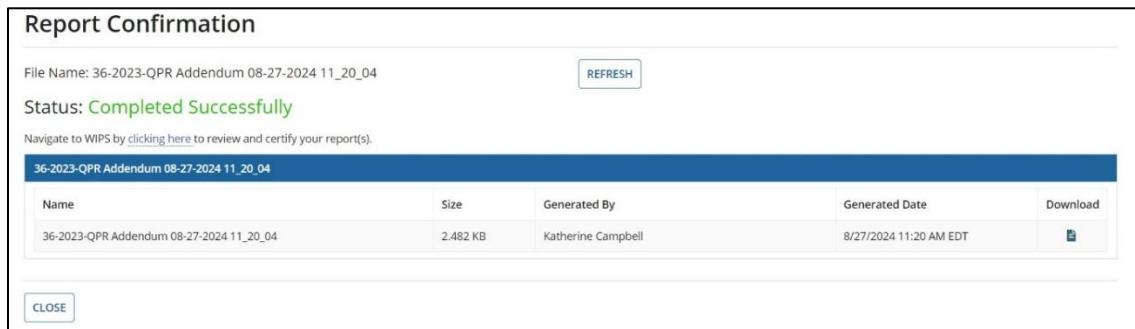
- Clicking **Close** will return you to the Admin Console without completing the request. Clicking **Generate** will redirect you to the next screen to generate the WIPS QPR addendum. Click **Generate**.
- The *Report Confirmation* screen will appear.

**Report Confirmation**

File Name: 39-2024-QPR Addendum 04-04-2025 11_05_01	<input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;" type="button" value="REFRESH"/>								
Status: Pending									
39-2024-QPR Addendum 04-04-2025 11_05_01									
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">Name</th> <th style="width: 25%;">Size</th> <th style="width: 25%;">Generated By</th> <th style="width: 25%;">Generated Date</th> </tr> </thead> <tbody> <tr> <td>39-2024-QPR Addendum 04-04-2025 11_05_01</td> <td>1,539 KB</td> <td>Fred Keische</td> <td>4/4/2025 11:05 AM EDT</td> </tr> </tbody> </table>		Name	Size	Generated By	Generated Date	39-2024-QPR Addendum 04-04-2025 11_05_01	1,539 KB	Fred Keische	4/4/2025 11:05 AM EDT
Name	Size	Generated By	Generated Date						
39-2024-QPR Addendum 04-04-2025 11_05_01	1,539 KB	Fred Keische	4/4/2025 11:05 AM EDT						
<input style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;" type="button" value="CLOSE"/>									

- Click the **Refresh** button until the status updates to "Completed Successfully." This process will take up to 10 minutes. If you click **Close** before the status updates, you will need to restart the WIPS QPR generation process to access the file.

11. Once the status updates, click the download icon to save a copy of the WIPS QPR Addendum report to your local drive, where you can view the results.



The screenshot shows a 'Report Confirmation' dialog box. At the top, it displays 'File Name: 36-2023-QPR Addendum 08-27-2024 11\_20\_04' and a 'REFRESH' button. The status is shown as 'Completed Successfully'. Below this, a message says 'Navigate to WIPS by [clicking here](#) to review and certify your report(s.)'. A blue banner at the bottom of the dialog box displays the file name '36-2023-QPR Addendum 08-27-2024 11\_20\_04'. The main content area is a table with the following data:

Name	Size	Generated By	Generated Date	Download
36-2023-QPR Addendum 08-27-2024 11_20_04	2.482 KB	Katherine Campbell	8/27/2024 11:20 AM EDT	

At the bottom left of the dialog box is a 'CLOSE' button.

## 16. Generate WIPS QPR

The *Generate WIPS QPR* functionality allows you to generate a WIPS Quarterly Progress Report (QPR). The reports that are available depend on your access level and permissions, according to the following table:

GPMS role	WIPS QPRs available to generate
<b>Program Analyst &amp; Read-only Global</b>	All grantees and their sub-grantees
<b>Grantee Administrator &amp; Read-only Grant, Sub-Grantee Administrators</b>	Grantee specific to their access + all sub-grantees in that grant
<b>Supervisor, Case Manager</b>	These functions are not available for these users

To generate the WIPS QPR:

1. Log in as an authorized user.
2. Select **Admin Console** from the main navigation bar.
3. Click **Generate WIPS QPR**. The most recent program year and quarter are automatically selected. The following instructions display below the banner: "Please select the grantee in order to Generate WIPS QPR Report for program year [XXXX] and quarter [XX/X/XXXX – XX/XX/XXXX]."
4. Next, a dynamic search field or dropdown will appear for **Grantee**.
  - a. As a Grantee Administrator, the available dropdown will display only grantees associated with the user.
  - b. As a Program Analyst, you will select from a search field in which you enter the name of the grantee you are searching for (until you can select a match).

5. After you have selected the grantee, the screen will update to show all available sub-grantees under that grantee. All sub-grantees are selected for the report by default.

6. Clicking **Close** will return you to the Admin Console without generating the WIPS QPR. Clicking **Export** will redirect you to the next screen. Click **Export**.

7. The next screen will appear with the following message: "Your WIPS QPR is being processed." This submits the QPR to the WIPS system. Once the system has finished processing the report, the screen will display the following message. This will take several minutes, depending on the number of sub-grantees associated with the grantee. To view the generated WIPS QPR, please log into the WIPS system.

## Your WIPS QPR is being processed!

Note that you still must certify your uploaded report(s). Navigate to WIPS QPR by [clicking here](#) to review and certify your report(s).

[↻ Click Refresh](#)

1. Checking and Correcting Errors in your Report File
 

**Note:** WIPS will send emails if you have errors in report file.

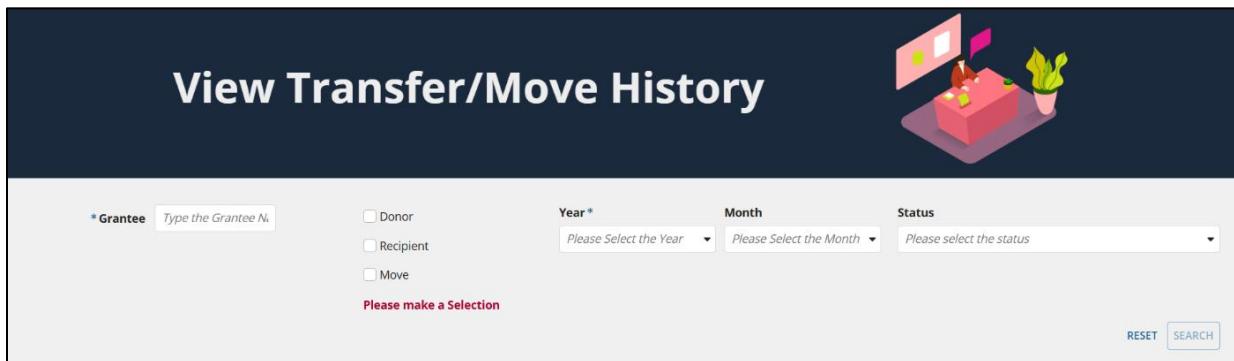
  - A. Go to step 2 if your report had no errors, otherwise proceed to B
  - B. Select **EDIT CHECK RESULTS** from WIPS tab bar
  - C. View errors by selecting numeric hyperlinks under **Total Errors** and **Total Duplicates**
  - D. Edit case(s) by returning to the Cases tab to correct errors if necessary. **Note:** This step is external to WIPS.
  - E. Resubmit Report
2. Reviewing your Uploaded Reports
  - A. Select **MY REPORTS** from WIPS tab bar
  - B. Select **Quarterly Reports or Annual Reports**
  - C. Find recent report uploaded under **Not Certified | Current Reporting Period** section
 

**Note:** Uploaded reports for earlier quarters will display under **Previous Reporting Periods** section
  - D. Open report by clicking hyperlink under **Status** in **Not Certified | Current Reporting Period** section
  - E. Confirm accuracy of information
  - F. Click **Certify** to send report for certification

**Note:** The associated **Quarterly Report** must be certified before the **Annual Report** can be certified

## 17. View Transfer/Move History

The *View Transfer/Move History* functionality is available only to grantee administrators and program analysts. Users can navigate to this card to review transfers and moves within a selected grantee and year.



The screenshot shows the 'View Transfer/Move History' page. At the top, there is a title 'View Transfer/Move History' and a small illustration of a person at a desk. Below the title are several input fields and dropdowns:

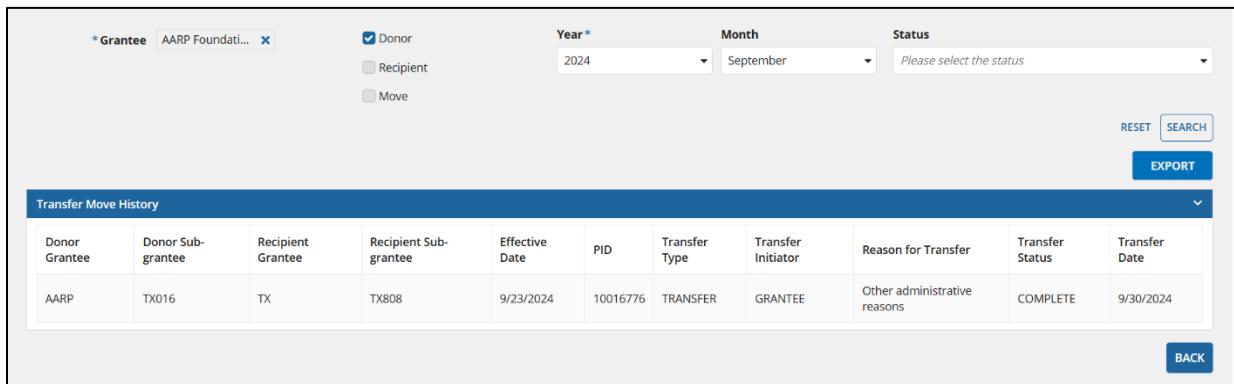
- Grantee:** A text input field with placeholder text 'Type the Grantee N...' and a note 'Please make a Selection'.
- Type:** Three checkboxes: 'Donor' (checked), 'Recipient', and 'Move'.
- Year:** A dropdown menu with placeholder text 'Please Select the Year'.
- Month:** A dropdown menu with placeholder text 'Please Select the Month'.
- Status:** A dropdown menu with placeholder text 'Please select the status'.

At the bottom right are 'RESET' and 'SEARCH' buttons.

The following fields appear that allow the users to filter transfers and moves:

- Grantee (Required):** If users have access to multiple grantees, please select a grantee by typing in the grantee name. A dynamic dropdown of grantees will appear.
- Type of transfer/move (Required):** Next to the grantee selection, users may select up to three checkboxes indicating whether they'd like to review donor transfer cases, recipient transfer cases, and/or moves.
- Year (Required):** Users must select the year of the transfer/move effective date, which will filter results to only display transfers/moves that occurred in that year.
- Month (Optional):** Users can optionally select the month of the transfer/move effective date, which will further filter results to display transfers/moves that occurred in the selected month of the selected year.
- Status (Optional):** Users can also optionally filter results using the **Status** dropdown. Users may select one of three statuses: *In-Progress*, *Complete*, and *Undone*.

To clear any existing selections, select **Reset**. After selecting all required fields, select **Search**. All transfers or moves that match selected criteria will display in a transfer move history table.



The screenshot shows the 'View Transfer/Move History' page with the following configuration:

- Grantee:** AARP Foundation
- Type:** 'Donor' (checked), 'Recipient', 'Move'
- Year:** 2024
- Month:** September
- Status:** (empty dropdown)

At the bottom right are 'RESET', 'SEARCH', 'EXPORT', and 'BACK' buttons.

A table titled 'Transfer Move History' is displayed, showing the following data:

Donor Grantee	Donor Sub-grantee	Recipient Grantee	Recipient Sub-grantee	Effective Date	PID	Transfer Type	Transfer Initiator	Reason for Transfer	Transfer Status	Transfer Date
AARP	TX016	TX	TX808	9/23/2024	10016776	TRANSFER	GRANTEE	Other administrative reasons	COMPLETE	9/30/2024

Users may also export results as a .CSV file. Select **Export** above the table results. Users will then navigate to the download view. Select **Refresh** until the report is ready.

#### Download View Transfer/Move History Report

View Transfer/Move History Report data is being exported. Click refresh until the file is ready to download.

Export File Exporting...  
(Last Refresh: 12/27/2025 2:30 PM EST)

REFRESH

Once the report is done exporting, users can select the download link to review results in a .CSV file.

#### Download View Transfer/Move History Report

Export File View Transfer History

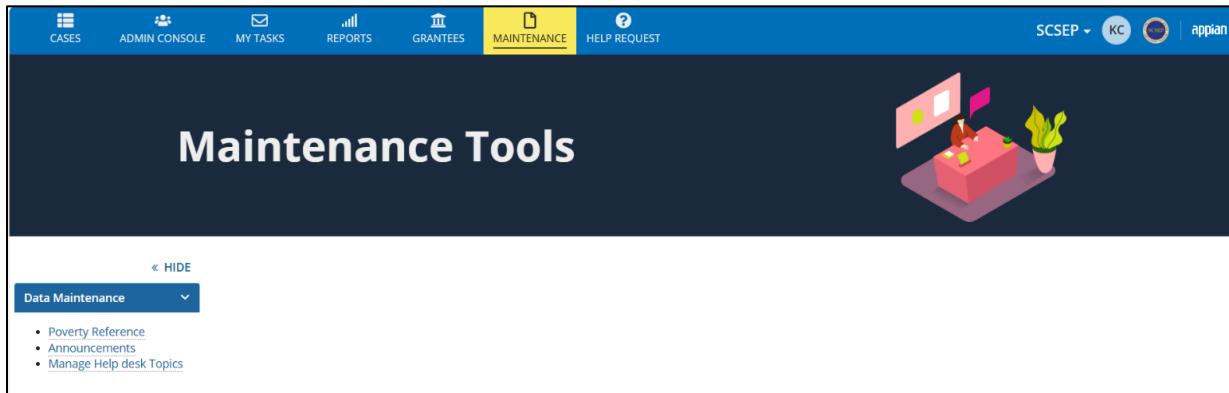
CLOSE

The downloadable .CSV file will display results with the following fields: donor grantee, donor sub-grantee, recipient grantee, recipient sub-grantee, effective date, PID, transfer type, transfer initiator, reason for transfer, transfer status, and transfer date.

Select **Close** to return to the *View Transfer/Move History* card.

## Maintenance

The **Maintenance** module is a feature available only to program analysts in the GPMS that is designed to allow program analysts to manage program-level information within the GPMS through three topics within the module: Poverty Reference, Announcements, and Manage Help desk Topics.



The screenshot shows the GPMS maintenance interface. At the top, there is a navigation bar with icons for Cases, Admin Console, My Tasks, Reports, Grantees, Maintenance (which is highlighted in yellow), and Help Request. To the right of the Maintenance icon are links for SCSEP, KC, and Appian. Below the navigation bar, the main title is 'Maintenance Tools'. On the left, there is a sidebar with a 'Data Maintenance' dropdown menu. The menu is currently set to 'Data Maintenance' and lists three items: 'Poverty Reference', 'Announcements', and 'Manage Help desk Topics'. The main content area is currently empty, showing a small decorative illustration of a desk with a computer monitor, a keyboard, and a potted plant.

- Select **Hide** to hide the maintenance links.
- Select **Show** to unhide the links.

On each of the maintenance pages, select **Back** to navigate back to the main landing page.

## 1. Poverty Reference

The poverty reference section allows program analysts to update poverty reference guidelines for each calendar year. There are nine fields on the page:

- **Year:** The year field is a dropdown field that displays the chosen calendar year.
- **Min Amount:** This field represents the poverty threshold for a one-person household for the 48 contiguous states and Washington, D.C.
- **Min Amount AK:** This field represents the poverty threshold for a one-person household in Alaska.
- **Min Amount HI:** This field represents the poverty threshold for a one-person household in Hawaii.
- **Add Amount:** This field is the amount to add to the poverty threshold minimum amount for each additional person in a household in the 48 contiguous states and Washington, D.C.
- **Add Amount AK:** This field is the amount to add to the poverty threshold minimum amount for each additional person in a household in Alaska.
- **Add Amount HI:** This field is the amount to add to the poverty threshold minimum amount for each additional person in a household in Hawaii.
- **Start Date:** The start date field represents the effective start date for the entered poverty amounts.
- **End Date:** The end date field represents the effective end date for the entered poverty amounts.

Year	Min Amount	Min Amount AK	Min Amount HI	Add Amount	Add Amount AK	Add Amount HI	Start Date	End Date
2025	15650	19550	17990	5500	6880	6330	01/15/2025	12/31/2027

Users may update values for the current calendar year, but previous year values may not be edited. Users can navigate to previous year values using the **Year** dropdown field.

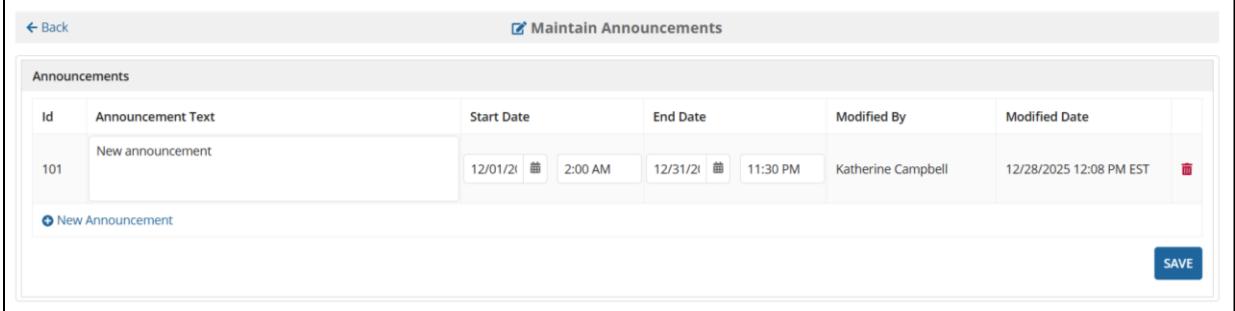
To edit the current year values, select the current year in the **Year** dropdown and directly select a field to edit. After entering the new values, select **Save** to save all edits.

## 2. Announcements

Program analysts also can add announcements that will display on the GPMS home page for a specified amount of time. To add or update displayed announcements, select the Announcements link on the Maintenance Tools home page. There are six fields displayed:

- **Id:** The Id field is an auto-generated, non-editable field unique identifier for each announcement.

- **Announcement Text (Required):** The Announcement Text field is an editable text box that contains the text to be displayed on a banner in the GPMS.
- **Start Date (Required):** The Start Date field is an editable date field where users can select the start date and time that the announcement should be displayed.
- **End Date (Required):** The End Date field is an editable date field where users can select end start date and time that the announcement should no longer be displayed.
- **Modified By:** The Modified By field is an auto-generated, non-editable field that displays the user that updated the editable fields for that announcement.
- **Modified Date:** The Modified Date field is an auto-generated, non-editable field that displays the date and time that the user updated the editable fields for that announcement.



The screenshot shows a web-based application titled 'Maintain Announcements'. At the top, there is a 'Back' button and a 'New Announcement' button. The main area is a table with the following data:

Announcements					
Id	Announcement Text	Start Date	End Date	Modified By	Modified Date
101	New announcement	12/01/21 2:00 AM	12/31/21 11:30 PM	Katherine Campbell	12/28/2025 12:08 PM EST

At the bottom right of the table is a 'SAVE' button.

Users can create a maximum of two announcements at one time. To create a new announcement, select **New Announcement**, enter in editable information, and select **Save**.

To remove an announcement, select the red trash can button that displays at the far right of each row. This will delete that selected announcement. Once there are fewer than two announcements, users can add a new announcement.

### 3. Manage Help Desk Topics

The last link on the Maintenance Tools landing page is the *Manage Help Desk Topics* screen, which allows program analysts to manage the topics that are displayed in the **Topic** dropdown in the Help Request Module (described in a later section). After navigating to the *Manage Help Desk Topics* page, the user will see the first 10 active help desk topics, organized alphabetically by topic. Users can filter results using the **Topics** dropdown.

There are six fields displayed:

- **Topic:** A dynamic dropdown to search for existing topics of the Help Desk Module tickets.
- **Created By:** An auto-generated field that displays the user that created the topic entry.
- **Created On:** An auto-generated field that displays the date and time that the user created the topic entry.
- **Modified By:** An auto-generated field that displays the user that modified the topic entry.
- **Modified On:** An auto-generated field that displays the date and time that the user modified the topic entry.
- **Status:** The status field displays where the topic is active or inactive.

Manage Help Desk Topics

## Manage Topics

Topics  ▼

Topic	Created By	Created On	Modified By	Modified On	Status	Actions
test topic	dasari.venkatalakshmi@dol.gov	4/18/2025 2:13 PM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:47 AM EDT	Inactive	
Test Topic 5193	wadsworth.joshua.d@dol.gov	4/24/2025 10:31 AM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:47 AM EDT	Inactive	
testtopic by lakshmi	dasari.venkatalakshmi@dol.gov	4/28/2025 1:45 PM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:47 AM EDT	Inactive	
Test Topic 5193 Retest	wadsworth.joshua.d@dol.gov	4/30/2025 8:53 AM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:55 AM EDT	Inactive	

« < 31 - 34 of 34 > »

[Add New Help Request Topic](#)

RESET SAVE

To create a new help request topic:

1. Select **Add New Help Request Topic**. A new entry will appear.
2. Enter text into the **Topic** field.
3. Select **Save**. This will add the topic and set the status to Active.

Manage Help Desk Topics ⚠

## Manage Topics

Topics  ▼

Topic	Created By	Created On	Modified By	Modified On	Status	Actions
New test topic	campbell.katherine.l@dol.gov	12/28/2025 12:18 PM EST	campbell.katherine.l@dol.gov	12/28/2025 12:18 PM EST	Active	
test topic	dasari.venkatalakshmi@dol.gov	4/18/2025 2:13 PM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:47 AM EDT	Inactive	
testtopic by lakshmi	dasari.venkatalakshmi@dol.gov	4/28/2025 1:45 PM EDT	wadsworth.joshua.d@dol.gov	4/30/2025 8:47 AM EDT	Inactive	

- To make the status inactive, select the **blue trash can** icon that displays at the far right of the row. This will remove the topic from the displayed list of topics in the dropdown in the Help Request Module.
- To reactivate inactive topics, select the **plus sign** icon at the far right of an inactive entry. This will make this topic visible again in the **Topics** dropdown in the Help Request Module.

# Help Request Module

The Help Request Module (HRM) allows users to submit and track help request tickets, correspond with the Help Support Team, and view open and previously resolved requests directly through the GPMS website. This module replaces Zendesk, the previous help desk software.

There are two groups of users in the HRM:

- **End Users:** All grantee and subgrantee GPMS users, including Case Managers, Supervisors, Subgrantee Administrators, and Grantee Administrators. End Users can submit help requests themselves or on behalf of other users and provide necessary details and attachments.
- **Help Support Team:** The Help Support Team is the primary point of contact for end users in the HRM. The team will correspond with end users, assign, prioritize, and resolve help requests, or direct requests to the appropriate team as needed.

The HRM is available to GPMS users when logged in to the system. The SCSEP Help Support team operates **Monday through Friday, 8:00 AM to 6:00 PM Eastern**. The Help Support team strives to acknowledge and begin triage on all requests within the same business day. Help requests received outside of these hours will be addressed the next business day.

Users can navigate to the HRM in the GPMS from the main navigation bar at the top of the screen. Click the HRM tab on the far right to open the help request module.



## Help Request Module Landing Page

A screenshot of the Help Request Module landing page. The page is titled 'Help Request Module'. It features a 'Request Information' section with a note to submit a new request, a 'Status Information' section with a legend for request status, and a 'SCSEP Help Requests' section with a search bar and a table of requests. The table has columns for Request ID, Subject, Description, Status, Topic, Priority, Assignee, Grantee, Sub Grantee, Created By, Created Date, and Last Updated. A red box highlights the 'Request Information' section, another red box highlights the 'Status Information' section, a third red box highlights the search bar and filters, and a fourth red box highlights the 'New Request' button and the request table.

On the HRM Landing Page, users will see:

1. General information about the case status and progress

2. Filters that can be applied to narrow the list of Help Requests displayed in the summary grid:
  - a. **Search Bar:** Enter a keyword to search across all requests.
  - b. **Topic:** Select a category (e.g., Data Validation, Duration Limit).
  - c. **Status:** Choose from statuses (e.g., New, In Progress, Closed).
  - d. **Priority:** Sort by urgency (e.g., Low, Medium, High).
  - e. **Grantee/Sub-Grantee:** Filter by organization.
  - f. **Created Date:** Filter requests based on the submission date.
  - g. **Created By:** Filter by the requester's name
3. **New Help Request:** Click this button to initiate a new help request ticket. See "[Create a new help request](#)" below.
4. Help Request Summary Grid, which includes the following fields:
  - a. **Request ID:** Unique identification number for each request.
  - b. **Subject:** A brief title describing the request.
  - c. **Description:** Summary of the Help Request provided by the requester
  - d. **Status:** Indicates the current state of the request (e.g., New, In Progress, Closed).
  - e. **Topic:** The category of the issue (e.g., Data Validation, Duration Limit).
  - f. **Priority:** Shows the urgency level (e.g., Low, Medium, High).
  - g. **Assignee:** Displays the person responsible for the request.
  - h. **Grantee:** Displays the organization handling the request.
  - i. **Sub-Grantee:** Displays the division under the grantee (if applicable).
  - j. **Created By:** Shows the name of the requester.
  - k. **Created Date:** The date the request was submitted.
  - l. **Last Updated:** The date of the most recent update.
5. Quick Actions tab with links to easily access different functionalities within the help request module.
  - a. **Show Watch Requests:** Displays requests the user has selected to watch, using the Related Actions tab in the request.

## Create a New Help Request

All GPMS users can create a new help request. Click the **New Help Request** button. A new screen will appear.

**E-mail details:** All users and email addresses listed in this section will receive notifications when the new request is submitted. By default, the SCSEP Help Support email is listed, along with the email of the user submitting the request. Any other email address may be added as a cc: or bcc: to the help request. These users will also receive email notifications if a new comment is added to the request or the request is resolved.

- **Email Address:** Default SCSEP Help Support email address.
- Click **Add New Email** if any additional users should be notified about the progress of this help request. The email address mentioned will receive a progress notification in their mailbox as the help request progresses.

**Organization Details:** Select the grantee and sub-grantee (if applicable) for this help request. You can also use this section to indicate if you are submitting this request on behalf of another user. If you're submitting the request on behalf of a user who doesn't have an account in GPMS, you can enter their email address instead.

- **Grantee:** Select the appropriate grantee from the dropdown.
- **Sub-Grantee:** Select the relevant sub-grantee (if applicable).

**Request Details:** Please provide a detailed description of your issue or concern. **Request Subject**, **Topic**, and **Request Detail** are required fields. You can also upload supporting documents, attachments, and screenshots. Please add as much detail as possible to assist the Help Support Team in resolving your request. For each request, you will be prompted for the following information:

- **Request Subject (Required):** Enter a short, descriptive title of the issue (up to 100 characters).
- **Topic (Required):** Select from the dropdown (e.g., Data Validation, Duration Limit).
- **Upload File (Optional but recommended):** Attach supporting documents or screenshots (PNG, JPG, PDF, DOC, XLS, TXT, MSG, PPT, etc.)
- **Detail (Required):** Enter a detailed explanation of the issue (up to 4000 characters).

Click **Send** to submit the request. The requestor will receive an email notification whenever a help request ticket is created. Once the request is submitted, the description and status are displayed on the HRM Landing Page summary grid.

## Viewing and Adding Comments to a Request

Users can access and view past help requests from the HRM landing page. Click the Help Request ID link to view the request in a pop-up window.

SCSEP Help Requests										
SEARCH		TOPIC	STATUS	GRANTEE NAME	CREATED BY	CREATED DATE	LAST UPDATED	LAST UPDATED BY	LAST UPDATED DATE	LAST UPDATED BY
Sub-Grantee Name: Any Created By: Any Created Date: Any - 03/10/2023										
<a href="#">+ NEW HELP REQUEST</a>										
Request ID	Subject	Description	Status	Topic	Assignee	Grantee	Sub-Grantee	Created By	Created Date	Last Updated
263	Test Subject	Test Detail	New	Other	AARP Foundation Programs		sudha.donorgrantee@gmail.com	sudha.donorgrantee@gmail.com	3/10/2025 10:10 AM	3/10/2025 10:10 AM
262	Test Subject	Test Detail	In Progress	Other	Aashish Sanghvi	AARP Foundation Programs	sudha.donorgrantee@gmail.com	sudha.donorgrantee@gmail.com	3/10/2025 10:03 AM	3/10/2025 10:04 AM
4	Unable to download current exit report	Testing	In Review	Reports			sudha.donorgrantee@gmail.com	sudha.donorgrantee@gmail.com	12/26/2024 3:41 PM	3/6/2025 9:47 AM
5	Email issue with QPR	Did not get email to download the QPR	Resolved	QPR			sudha.donorgrantee@gmail.com	sudha.donorgrantee@gmail.com	12/26/2024 3:42 PM	1/13/2025 9:14 PM
3	Login issues	Unable to login to SCSEP	Closed	Error Messages	Goodwill Industries International	Gl Aaron OH	sudha.donorgrantee@gmail.com	sudha.donorgrantee@gmail.com	12/26/2024 2:54 PM	12/26/2024 3:16 PM

**Status Progress bar:** When viewing a request, the status is displayed on the left of the screen. The Help Request statuses are:

- **New:** The request has been submitted but has not been reviewed.
- **In Review:** The request has been triaged and assigned to a support team member.
- **In Progress:** The support team is actively working on the request.
- **Resolved:** The support team has resolved the issue and is awaiting verification.
- **Closed:** The issue is resolved and verified, and the request is closed.

Test Subject (Request ID: 263)

Summary Documents Comments Audit Related Actions

New  
 In Review  
 In Progress  
 Resolved  
 Closed

**Request Summary**

Priority: -

Request Submitter: sudha.donorgrantee@gmail.com

Date Submitted: March 10, 2025 10:10 AM

Assignee:

**Request Details**

Subject: Test Subject

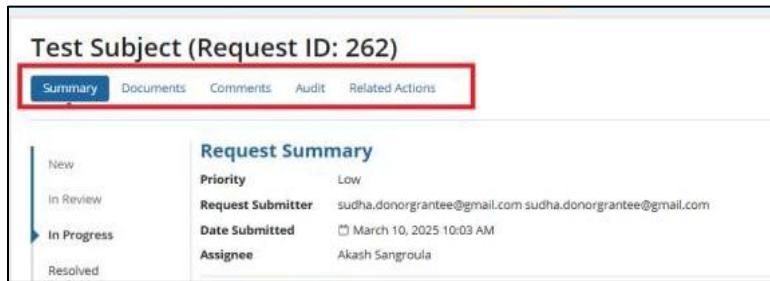
Category: Other

Description: Test Detail

**Latest Comments**

Comment:

To view the details of a request, add comments, and take other actions, use the navigation tabs at the top of the request:



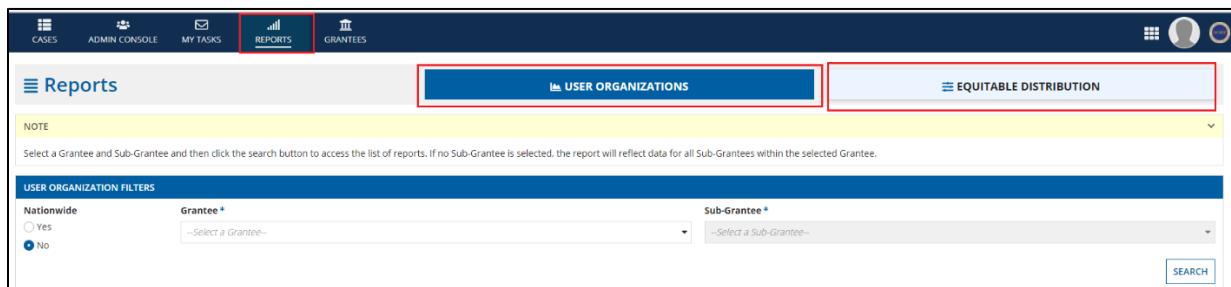
There are five navigation tabs:

- **Summary:** From this tab, you can view important details about the request, including a summary, the request details and the latest comment added to the request.
- **Documents:** From this tab, you can upload additional documents and relevant screenshots to the help request. Most standard file types are supported, including PNG, JPG, PDF, DOC, XLS, TXT, MSG, PPT, etc.
- **Comments:** The comments tab allows communication between the Help Support Team and the requester. Users can view all comments previously added to the request. To add a new comment, click the Add Comment button at the top right of the screen. The requester will receive an email notification every time a comment is added to the Help Request.
- **Audit:** The audit tab displays the ticket history.
- **Related Actions:** This tab displays further actions that may be taken with the Help Request, such as Start Watching Request.

## 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:

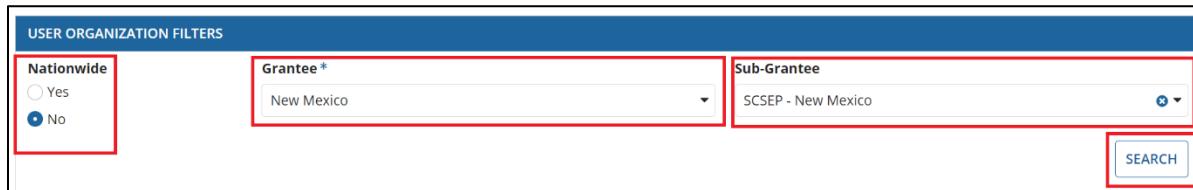
- User Organizations
- Equitable Distribution



## 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**.



USER ORGANIZATION FILTERS

**Nationwide**

Yes  
 No

**Grantee\***

New Mexico

**Sub-Grantee**

SCSEP - New Mexico

**SEARCH**

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

### 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 Administrator:**
  - a. As above, for Case Manager for Participants.
4. **Grantee Administrator:** 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 Administrator, plus these additional.
  - a. Participants: As above for Grantee Administrator.
  - b. Actions: As above for Grantee Administrator.
  - 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*.

<b>Results Summary</b>					
Number of Current Participants:	388				
Average Time in Program:	620 Days				
Average Time in [District of Columbia]:	620.08 Days				
Number of Participants with More Than One Displayed Enrollment:	29				
Average Number of Enrollments Per Participant:	1.05				
Average Days in Displayed Enrollments:	520.51				
Average Number of Displayed Assignments Per Enrollments:	1				
Average Days in Current Assignments:	495				
Average Days in Displayed Assignments:	495				
<b>Results Details</b>					
Case ID	Participant Name	Contact Number	Initial Assignment Date	Exit Date	Status
99001305	Alfred Prince		8/27/2021	10/24/2021	Exited - Closed
99001154	Arnold Sums	708333123	8/24/2021	9/20/2021	Exited - Closed
99001666	Ben Lux		4/6/2022	4/13/2022	Exited - Closed
99003032	Benedict Cumberbatch		6/1/2021		Active
99001293	Bob Wahlberg	4343141345	7/26/2021	11/30/2021	Exited - Closed

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.

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

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

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

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

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

- 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).

<b>Results Details</b>			
	Case ID	Participant Name	Contact Number
	10365478	Torey Clark	5053604322

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

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.



The screenshot shows the 'Approved Breaks in Service' report search interface. At the top, there are three filter sections: 'Grant' (prefilled with 'New Mexico (Program Year: 2021, Grant #: AD362452160A35)'), 'Break Date Range' (with 'Beginning' set to '01/01/1990' and 'End' as a placeholder 'mm/dd/yyyy'), and 'Case Manager' (a dropdown menu with the placeholder '... Please select a value ...'). Below the filters is a table with the following columns: Name, Phone, County, Start Date, Expected End Date, Actual End Date, Exit Date, Grant Name, Case Manager, Reason For Break, Days on Break, and Documentation Provided. The 'EXPORT' button is highlighted with a red box in the top right corner of the table area.

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.

Approved Breaks in Service				
Name	Size	Generated By	Generated Date	Download
Approved Breaks in Service 12-01-2022 03_01_26	3.459 KB	Fred Keische	12/1/2022 3:01 PM EST	
<a href="#">CLOSE</a>				

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_GRAN	LAST_NAME	FIRST_NAME	PARTICIPANT	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	

### 1.3 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:	<a href="#">4</a>	Total Participants 396 days	0
Total Participants 396 days	0	From Durational Limit with at Least One Waiver	
From Durational Limit:		Updated This Program Year:	
Participants within 30 days of Durational Limit:	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. Click **Refresh** until the aggregated report appears on the screen.
5. The aggregated results of this report can be exported by clicking **Export**.
  - a. Click **Export** to download a copy of the file to your default file location.
  - b. The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet.
6. Click on any of the numbers in the *Results Summary* to generate a **Participant Table** based on that particular metric.

**NOTE**

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

## Results Summary

**Durational Limit for all Active Participants:** 39

7. 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*).

<b>Participant Table: Durational Limit for all Active Participants</b>									
	Sub Grantee	Days Left	Participant	1	Participant ID	Home Phone Number	County of Residence	Application Date	Enrollment Date
≡	SCSEP - New Mexico	317	Aldridge, Ronald	1	9553501	(907) 203-0020	San Juan County	10/08/2020	10/16/2020
≡	SCSEP - New Mexico	288	Anderson, Caitlin	1	9925190	(505) 507-2741	Bernalillo County	07/02/2021	09/17/2021
≡	SCSEP - New Mexico	711	Benavidez-Sullivan, D'Anna	1	10004820	(575) 740-1158	Dona Ana County	09/28/2022	11/14/2022
≡	SCSEP - New Mexico	967	Beyuka, Mickey	1	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.

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

Smith, Mary	
<b>Participant Details</b>	
Case Assigned To	Race, American Indian or Alaskan Native
fkgrad02, fkgrad02	No
Age	Race, Asian
69	No
Date of Birth	Race, Black, African American
23-FEB-56	No
Sex	Race, Native Hawaiian/Pacific Islander
Female	No
Address	Race, White
23253 Littleton Avenue Accotink VA 23301	Yes
Email	Ethnicity: Hispanic, Latino, or Spanish Origin?
ksmith56@verizon.com	No
Disability	Has Enrollments In Other Grantees
Yes, Self	None
Veteran Status	
Status not known	
<b>Waiver Factors</b>	
	Severe Disability
	No
	Frail
	No
	Old Enough, Not Receiving SS Title II
	No
	Severely Ltd Emp Prospects
	No
<b>Limited English Proficiency</b>	
	No
	Low Literacy Skills
	No
	75 or Older
	No
	Formerly Incarcerated
	No - 7/1/2025

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

## 1.4 Participant Hours Report

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**Participant Hours Report**

**Filters**

<b>Program Year *</b>	<b>Participant Last Name</b>
<input type="text" value="Select the Program Year"/>	<input type="text" value="Search By Last Name"/>
<b>Quarter</b>	<b>Status</b>
<input type="text" value="Select the Quarter Number"/>	<input type="text" value="Show All Enrollments"/>
<input type="checkbox" value="Current Quarter"/> <input type="checkbox" value="YTD"/>	<input type="checkbox" value="Only show assignments with blank or 0 Total Hours"/> Only show assignments with blank or 0 Total Hours
<b>RESET</b> <b>SEARCH</b>	

To run this report:

- Select **Reports** from the main navigation bar.
- On the *User Organizations* tab, set up the user organization filters and click **Search**.
- Select **Participant Hours Report** from the *Participants* category.
- This report can be filtered by the following:
  - Program Year** (required): You can select individual years from 2021 to the current year.
  - Status**:
    - 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**.

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

<b>Grantee Summary Hours Table</b>						
Quarter	Total PRA Activities Hours	Total Paid In-Person CSA Hours	Total Paid Remote CSA Hours	Total Paid In-Person Training Hours	Total Paid Remote Training Hours	Total Paid Sick Leave Hours
Q1	0	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.

Case Summary Table																	
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O			
															↑	Participant Name	
																Goo, Pamela	
☰	10002860		10860370		CA019 AAA, County of Los Angeles												Gurule, Yolanda
☰	10006490		10871241		CA019 AAA, County of Los Angeles												Garcia, Ramon
☰	9567404		10842259		CA019 AAA, County of Los Angeles												

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).

	9506540	CA020 San Bernardino Cty Dept of Aging & Adult Svcs	Gonzalez, Jose	(909) 969-1629	8/15/2022
---	---------	---	----------------	----------------	-----------

**Participant Assignment Details (Name: Gonzalez, Jose )**

Assignment: 9948767

Host Agency Name	Type	Assignment Date
Department of Aging and Adult Services - Rancho Cucamonga	Host Agency	8/15/2022
	Address	Assignment Start Date

a. Click **Export**.

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

**Download Participant Hours Participant Summary**

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

Export File Exporting...  
(Last Refresh: 12/3/2024 11:55 AM EST)

**REFRESH**

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

**Download Participant Hours Participant Summary**

Export File **Gonzalez, Jose - 2022 - Assignment Hours Report Summary**

**CLOSE**

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 Administrator or Program Analyst levels only.

### 2.1 Participant Actions Report

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**Participant Actions Report**

**INTRODUCTION**

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

**Filters**

Show Results

IEP       Physical or Waiver       Recertification       Safety Consultation

Initial Assignment Date From:        Initial Assignment Date To:

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.

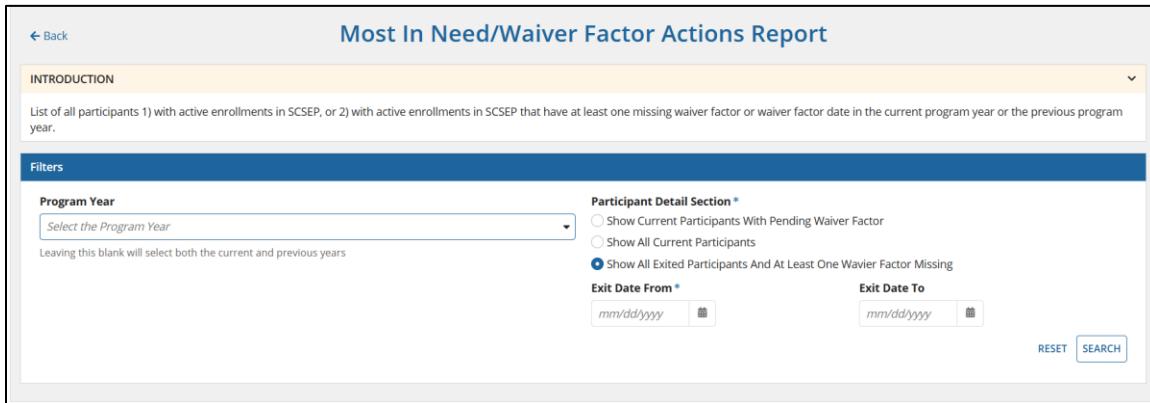
A	B	C
1 Number of Enrollment	205	
2 Number of Actions Pending	156	
3 Number of Actions Past Due	664	
4 Number of IEPs Pending	4	
5 Number of IEPs Past Due	201	
6 Number of Recertifications Pending	52	
7 Number of Recertifications Past Due	153	
8 Number of Physicals or Waivers	50	
9 Number of Physicals or Waivers	155	
10 Number of Safety Consultations	50	
11 Number of safety consultation pending	155	
12		
13		
14		
15		
16		
17		
18		
19		
<a href="#">Summary</a> <a href="#">Details</a> <a href="#">+</a>		

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. Grantee Acronym
- b. Subgrantee Code
- c. Participant (name)
- d. Participant ID
- e. Home Phone Number
- f. Email (participant)
- g. Initial Assignment Date
- h. Date of Last IEP
- i. Due Date of Next IEP
- j. Recertification Status
- k. Date of Recertification (In the Participant Actions Report, the pending recertification is blank in the Date of Recertification column until the Supervisor approves it.)
- l. Due Date of Next Recertification
- m. Date of Last Physical or Waiver
- n. Due Date of Next Physical or Waiver
- o. Assignment Date
- p. Date of Safety Consultation
- q. Host Agency Name

## 2.2 Most in Need/Waiver Factor Actions Report



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### Most In Need/Waiver Factor Actions Report

**INTRODUCTION**

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

**Filters**

**Program Year**  
Select the Program Year  
Leaving this blank will select both the current and previous years

**Participant Detail Section \***

Show Current Participants With Pending Waiver Factor  
 Show All Current Participants  
 Show All Exited Participants And At Least One Waiver Factor Missing

**Exit Date From \***  
mm/dd/yyyy

**Exit Date To \***  
mm/dd/yyyy

**SEARCH** **RESET**

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 to show *Current Participants With Pending Waiver Factors*, *All Current Participants* or *All Exited Participants And At Least One Waiver Factor Missing*. This is a required field.
  - c. **Exit Date From:** If *All Exited Participants And At Least One Waiver Factor Missing* is selected in the **Participant Detail Selection** field, a new required field, **Exit Date From**, will appear. Enter a date to specify a minimum exit date range filter.
  - d. **Exit Date To:** If *All Exited Participants And At Least One Waiver Factor Missing* is selected in the **Participant Detail Selection** field, a new required field, **Exit Date To**, will appear. Enter a date to specify a maximum exit date range filter.
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.

**Download Waiver Factor Participant Details Report**

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

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).

**Atkinson, Donald PID: 9565919**

**2024 WAIVER FACTORS**

**Severe Disability**

Yes - 10/03/2024

**Frail**

Yes - 10/03/2024

**Old Enough, Not Receiving SS Title II**

No - 10/03/2024

**Severely Limited Employment Prospects in Area of Persistent Unemployment**

No - 10/03/2024

**Limited English Proficiency**

Yes - 10/03/2024

**Low Literacy Skills**

No - 10/03/2024

**75 or Older**

Yes as of (12/03/2024)

**Formerly Incarcerated**

## 2.3 Follow-Up Reports

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**Follow-Up Reports**

**Introduction**

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

**Instructions**

The report includes the following options:

**Program Year** - By selecting one of the program year values, the report will display all follow-ups whose scheduled dates fell within the selected program year.

**Follow-Up Category** - By selecting one of the listed values, the report will display only the follow-up data from the selected category. By selecting all, the report will display information for all three follow-ups.

**Follow-up Status** - By selecting one or multiple follow-up statuses, the report will display a subset of records based on the selected checkboxes.

- Pending Follow-up: When the report run date is between the follow-up scheduled date and the end of the quarter for reporting.
- Overdue Follow-up: When the report run date is between the last day of the quarter for reporting and the relevant follow-up expiration date.
- Expired Follow-up: When the report run date is past the last day that a follow-up can be completed.
- Successful Follow-up: When wages or earnings were indicated for the follow-up.
- Negative Follow-up: When no wages or earnings were indicated for the follow-up.

**Filters**

<b>Program Year*</b> Choose the Program Year	<b>Follow-Up Status*</b>
<b>Follow-Up Category*</b> Choose a Follow-up Category	<input type="checkbox"/> Pending Follow-Up <input type="checkbox"/> Overdue Follow-Up <input type="checkbox"/> Expired Follow-Up <input type="checkbox"/> Successful Follow-Up <input type="checkbox"/> Negative Follow-Up

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

To run this report:

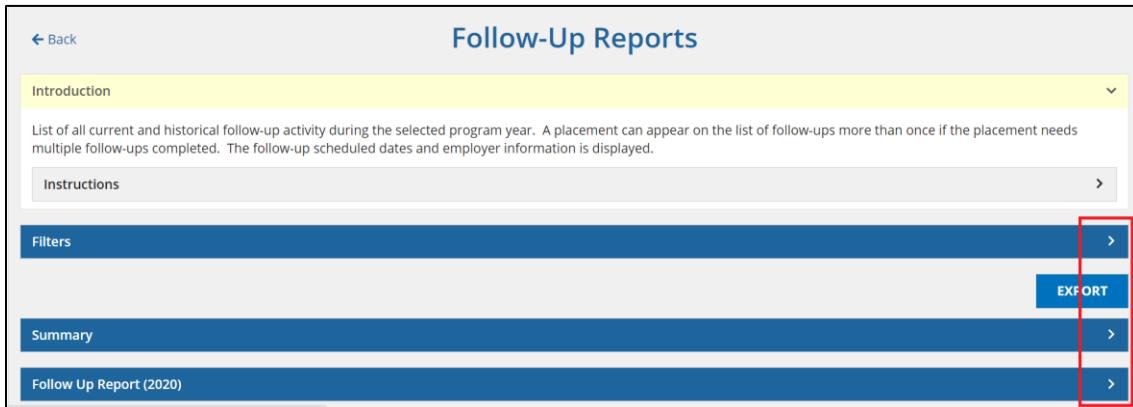
1. Select **Reports** from the main navigation bar.
2. On the *User Organizations* tab, set up the user organization filters and click **Search**.
3. Select **Follow-Up Reports** from the *Actions* category.
4. This report has three required filters. Each of these must be selected, in turn, to allow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

Summary														
Count of Cases <a href="#">?</a>					Number of Expired Follow-ups <a href="#">?</a>									
5					0									
Number of Pending Follow-Ups <a href="#">?</a>					Number of Successful Follow-ups <a href="#">?</a>									
0					12									
Number of Overdue Follow-ups <a href="#">?</a>					Number of Negative Follow-ups <a href="#">?</a>									
0					0									
Follow Up Report (2020)														
Follow Up Results Details														
Participant First Name	Participant Last Name	Participant ID	Participant Case ID	Participant Phone	Participant Email	Case Assigned To	Participant Exit Date	Follow-Up1 Scheduled Date	Follow-up1 Completed Date	Follow-Up 1 Status				
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.

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

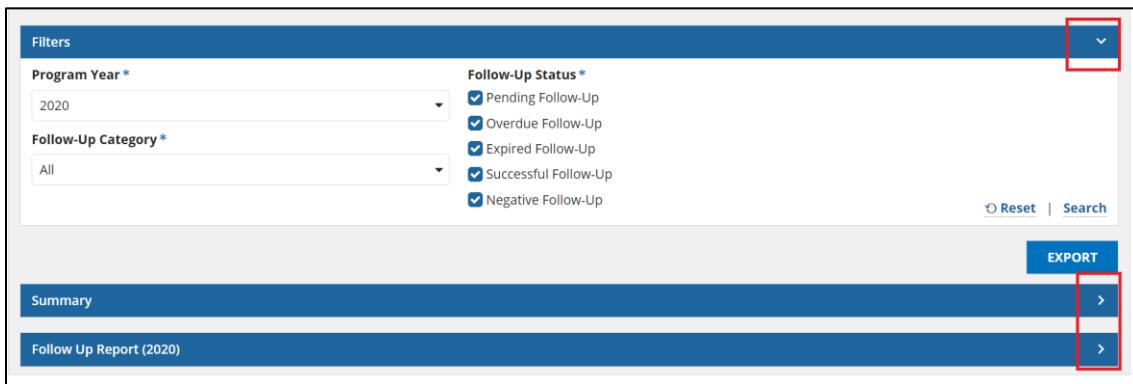


The screenshot shows the 'Follow-Up Reports' page with the following structure:

- Header:** Follow-Up Reports
- Navigation:** Back
- Section 1:** Introduction (Contracted)
- Section 2:** Instructions (Contracted)
- Section 3:** Filters (Contracted)
- Section 4:** EXPORT button (Visible)
- Section 5:** Summary (Contracted)
- Section 6:** Follow Up Report (2020) (Contracted)

Red boxes highlight the 'EXPORT' button and the right arrows indicating expand/collapse for the sections.

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



The screenshot shows the 'Follow-Up Reports' page with the following structure:

- Header:** Follow-Up Reports
- Section 1:** Filters (Expanded)
- Filter Options:**
  - Program Year \*: 2020
  - Follow-Up Status \*:
    - Pending Follow-Up
    - Overdue Follow-Up
    - Expired Follow-Up
    - Successful Follow-Up
    - Negative Follow-Up
  - Follow-Up Category \*: All
- Section 2:** EXPORT button (Visible)
- Section 3:** Summary (Contracted)
- Section 4:** Follow Up Report (2020) (Contracted)

Red boxes highlight the 'EXPORT' button and the right arrows indicating expand/collapse for the sections.

12. Click **Export**.

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

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

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

- The file has two tabs, **Summary** and **Details**, corresponding to what you see on the report screen.
- 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



The screenshot shows the 'Assignment by Host Agency Report' search interface. At the top, there is a 'Back' button and a title bar. Below the title bar is a 'Filters' section with the following options:

- Display Active Host Agencies Only
- Display Active Assignments Only
- Assignment Active From: A date input field with the placeholder 'mm/dd/yyyy' and a calendar icon.
- Assignment Active Through: A date input field with the placeholder 'mm/dd/yyyy' and a calendar icon.
- Show Report Summary
- Show Organization Summary
- Show Most Recent Assignment Only

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

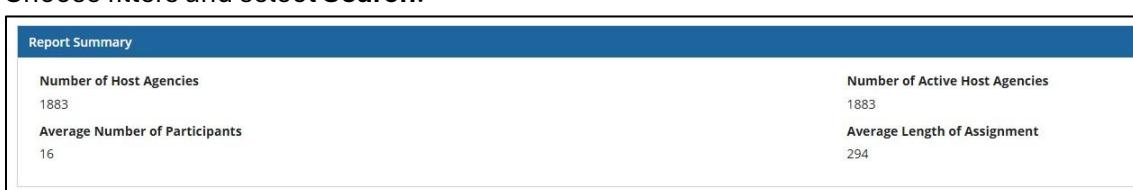
To run this report:

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. The system will generate the report. Select the **Refresh** button until the report appears on the screen.



The screenshot shows the 'Assignment by Host Agencies' report interface. The title is 'Assignment by Host Agencies'. Below the title, a message says 'Initializing Report (Loading Data)...'. On the right side, there is a 'REFRESH' button with a red box around it, and a 'BACK TO REPORTS' button below it.

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. Selecting **Reset** will clear the values for the filters.
6. Choose filters and select **Search**.



The screenshot shows a 'Report Summary' table with the following data:

Report Summary	
Number of Host Agencies	1883
Average Number of Participants	16
Number of Active Host Agencies	1883
Average Length of Assignment	294

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

- 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.
- 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**.

Report Summary		EXPORT
Number of Host Agencies	213	Number of Active Host Agencies
Average Number of Participants	3	Average Length of Assignment
		563

- Click **Refresh** until a file name appears next to **Export File** on the screen.
- Click on the file name or right-click on the file name to download a copy of the file to your default file location.
- The exported file is downloaded. You can access the file with any program that can read a Microsoft Excel Worksheet. The file has three tabs, **ReportSummary**, **OrgSummary**, and **participantSummary**, corresponding to the *Report Summary*, *Organization Summary*, and

*Participant Summary* 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 Administrator or Program Analyst levels only.

#### 3.1 Customer Satisfaction Survey (Future Report)

[← Back](#)

### Customer Satisfaction Survey

**Customer Satisfaction Summary**

Total Number of Employers with Pending Employer Survey: 0

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

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

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

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

#### 3.2 County Reports

[← Back](#)

### County Reports

**Report Type**

Report

— Select a Report —

**Report Range**

Date From

Date To

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

This report is available at the Program Analyst level only.

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

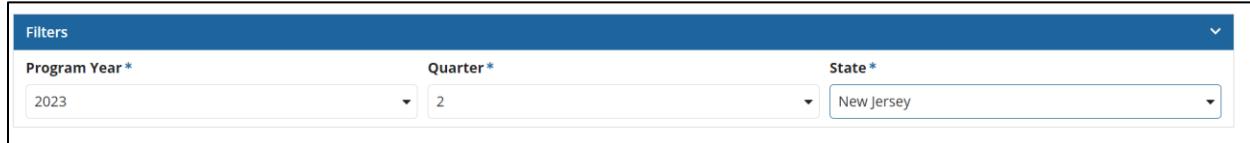
The Equitable Distribution (ED) report highlights a grantee's performance by comparing the authorized positions allotted to them in a given county and the number of enrollees in SCSEP within the county. It is one of the tools available to grantees to track their enrollments within the program.

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



Filters

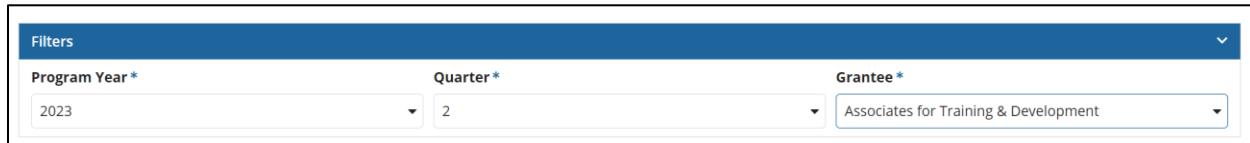
Program Year \* 2023

Quarter \* 2

State \* New Jersey

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

## 4.2 Authorized Positions by Grantee



Filters

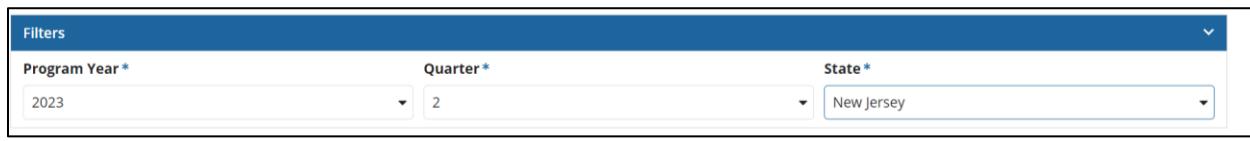
Program Year \* 2023

Quarter \* 2

Grantee \* Associates for Training & Development

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

## 4.3 Modified Positions by State



Filters

Program Year \* 2023

Quarter \* 2

State \* New Jersey

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

## 4.4 Modified Positions by Grantee

Filters

Program Year \* Quarter \* Grantee \*

2023 2 Associates for Training & Development

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

## 4.5 Download Authorized Positions

Filters

Program Year \* Quarter \*

2023 2

Download Generated File

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

## 4.6 Download Modified Positions

Filters

Program Year \* Quarter \*

2023 2

Download Generated File

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

Click 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 ... <a href="#">Show More</a>
	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 ... <a href="#">Show More</a>
	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... <a href="#">Show More</a>
	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 ... <a href="#">Show More</a>
	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... <a href="#">Show More</a>
	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... <a href="#">Show More</a>

« < 1 - 10 of 495 > »

[+ Show Columns](#)

## 2. Notifications

The *Notifications* section displays notifications generated at various stages of the case management process. Grantee Administrator 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:

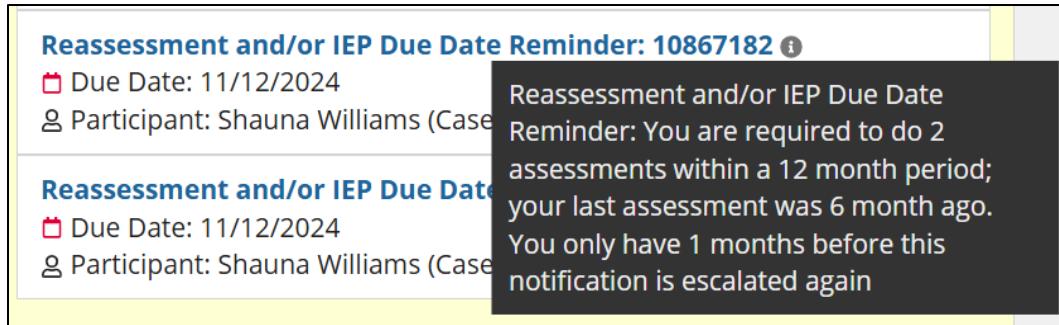
The screenshot shows a list of notifications. At the top, there is a header with a megaphone icon and the text 'Notifications (33)'. To the right of the header are two red-bordered buttons: one with a magnifying glass icon and another with a circular arrow icon. Below the header is a search bar labeled 'Notification Type' with a dropdown arrow. To the right of the search bar are 'SORT' and 'FILTER' buttons. The main list contains five items, each with a close button ('X') to its right:

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

At the bottom of the list, there are navigation buttons: '< < 1 - 5 of 33 > >'.

This screenshot shows the same notification list as the first one, but with a different interface. At the top, there is a header with a megaphone icon and the text 'Notifications (33)'. To the right of the header is a button labeled '+ Show Filters'. Below the header is a search bar labeled 'Notification Type' with a dropdown arrow. To the right of the search bar are 'SORT' and 'FILTER' buttons. The main list contains the same five items as the first screenshot, each with a close button ('X') to its right. At the bottom of the list, there are navigation buttons: '< < 1 - 5 of 33 > >'.

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.

Filters

Notification Type

Select a Notification Type

Due Date From      Due Date To

mm/dd/yyyy      mm/dd/yyyy

Escalated?

Yes    No

RESET   SEARCH

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])

Filters

Notification Type	Reassessment	Due Date From	mm/dd/yyyy	Due Date To	mm/dd/yyyy
-------------------	--------------	---------------	------------	-------------	------------

Reassessment and/or IEP Due Date Reminder: 10868792 ⓘ  
X Due Date: 7/2/2023  
X Participant: (Case ID: 10868792)

Reassessment and/or IEP Due Date Reminder: 10868773 ⓘ  
X Due Date: 7/2/2023  
X Participant: (Case ID: 10868773)

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 Administrators and Global Read Only users can utilize search functionality but cannot edit information.

GRANTEES

<span style="color: blue;">■</span> GRANTEES	<span style="color: blue;">■</span> SUB-GRANTEES
--	--

The *Grantees* screen has two sections:

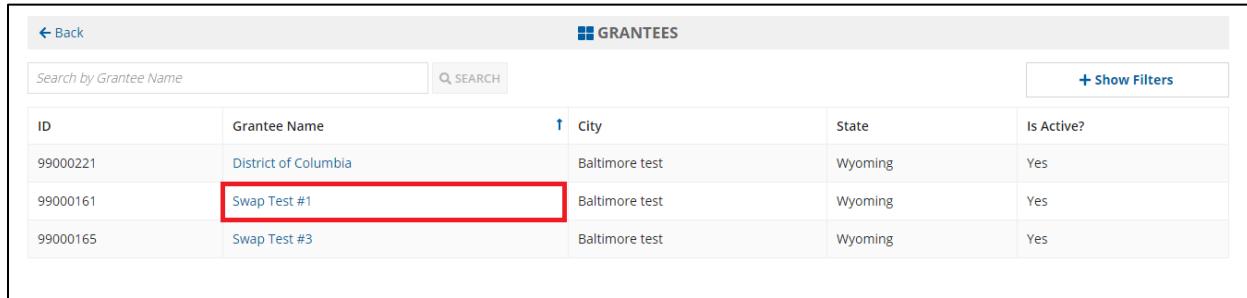
- Grantees
- Sub-Grantees

### 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:



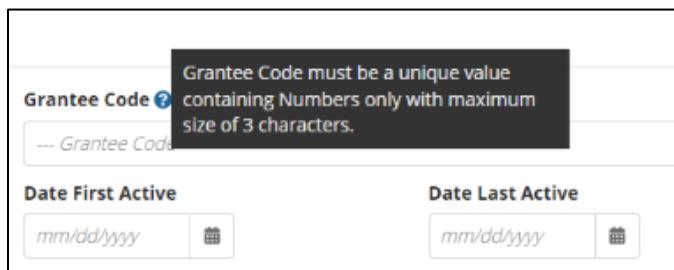
ID	Grantee Name	City	State	Is Active?
99000221	District of Columbia	Baltimore test	Wyoming	Yes
99000161	Swap Test #1	Baltimore test	Wyoming	Yes
99000165	Swap Test #3	Baltimore test	Wyoming	Yes

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



Grantee Name

Add Grantee



Grantee Code ? Grantee Code must be a unique value containing Numbers only with maximum size of 3 characters.

Date First Active Date Last Active

## 1.1 Summary

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

California		MANAGE IDL POLICY		MANAGE SUB-GRANTEES	
<a href="#">summary</a>	Sub-Grantees	Related Actions			
<b>Grantee Summary</b>					
Grantee Name California	Grantee Code 420	National Grantee No			
Active Yes	Date First Active 06/29/2006	Date Last Active			
Region Region 6					
<b>Administrator Info</b>					
Username scsepmp+ccagra@gmail.com	Name scCAGranadmin Cavus	Work Phone	Fax Number	Email scsepmp+ccagra@gmail.com	
<b>Read Only Info</b>					
Username	Name	Work Phone	Fax Number	Email	
No users are Available					
<b>Durational Limit Policies</b>					
Policy ID 9000226	Extension Option No Extensions (Option #1)	Effective Date 7/1/2011	Policy Status Active		

## 1.2 Sub-Grantees

On the *Sub-Grantees* tab, a Grantee Administrator, Program Analyst, and Global Read Only users 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.

California		MANAGE SUB-GRANTEES			
<a href="#">Summary</a>	<a href="#">Sub-Grantees</a>	Related Actions			
<b>California Sub-Grantees</b>					
<b>Grantee Summary</b>					
Grantee Name California	Grantee Code 420	National Grantee No			
Active Yes	Date First Active 06/29/2006	Date Last Active			
Region Region 6					
<b>Search Sub-Grantees</b>					
<input type="text" value="Org. Name or Sub-Grantee Code"/>		<input type="button" value="Reset"/>	<input type="button" value="Search"/>		
<input type="checkbox"/> Show Active and Inactive Sub-Grantees					
Sub-Grantee Name CA009 Alameda AAA, Dept of Adult & Aging Svcs	Sub-Grantee Code CA009	Effective Date	End Date	Status Active	
CA010 Sourcewise	CA010				

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 for Grantee Administrator user roles and below. Program analysts may edit existing sub-grantee information. To edit sub-grantee information, select **Related Actions** then **Edit Sub-Grantee Organization**.

## AARP Foundation SCSEP - Oklahoma City, OK

Summary Related Actions

 [Edit Sub-Grantee Organization](#)  
Edit Sub-Grantee Organization's Details (Sub-Grantee Code, Active Status, etc)

Users can then update sub-grantee information. Users may not deactivate sub-grantees if there are still open cases associated with the sub-grantees. If all cases associated with the sub-grantees have been closed or moved, then users can inactivate sub-grantees by selecting **Active = No**. The **Date Last Active** field is required if **Active = No**.

## AARP Foundation SCSEP - Oklahoma City, OK

Summary Related Actions

### Edit AARP Foundation SCSEP - Oklahoma City, OK

Sub-Grantee Name *	Grantee Acronym *	Sub-Grantee Code *
AARP Foundation SCSEP - Oklahoma City, OK	AARP Foundation SCSEP - Oklahoma City, OK	OK212
Active	Date First Active	Date Last Active
<input checked="" type="radio"/> Yes <input type="radio"/> No	01/20/2017	mm/dd/yyyy
Deactivation Is Not Available		
This Sub-Grantee has 108 open Case(s). Open Cases that are connected to this Grantee, directly or indirectly (through Sub-Grantees), should be Closed, Canceled, Exited-Closed, or Transferred for Deactivation option to be available.		
<small>Any Case that is NOT in Exited-Closed, Canceled, or Deleted State is considered Open. These type of cases need active Case Manager, Sub-Grantee Organization, and Grantee Organization.</small>		

[CANCEL](#)

[UPDATE](#)

After updating selected fields, select **Update** to save edits. Select **Cancel** to discard any edits.

## 1.3 Related Actions

Related actions that can be taken by a Grantee Administrator and Program Analyst are displayed:

### Swap Test #1

Summary Sub-Grantees **Related Actions**

 [Manage Grants](#)  
Manage Grantee's Grants and Sub-Grantees access to them

 [Manage Authorized Positions](#)  
View and Allocate Authorized Positions to Sub-Grantees

### 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:

**Grant Filters**

Program Year  
-- Select a Program Year --

Grants

Grant Number  
AD362992160A24

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

**Grantee Summary**

Grantee Name Example Grantee	Grantee Code 10800	National Grantee No
Active Yes	Date First Active 06/30/2014	Date Last Active
Region		

**ADD SUB-GRANTEES**

Search Sub-Grantees  
Org. Name or Sub-Grantee Code   |

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

**Add Sub-Grantees**

Grantee	Effective Date
No Sub Grantee Record Found	
<input type="radio"/> Add Sub Grantee	
<input type="button" value="CANCEL"/>	<input type="button" value="CREATE NEW SUB-GRANTEE"/> <b>ADD SUB-GRANTEES</b>

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.

Grantee Acronym *	Sub-Grantee Code *
<input type="text" value="GRNT"/>	<input type="text" value="SG123"/>
Date Last Active	<input type="text" value="mm/dd/yyyy"/> <input type="button" value=""/>
<input type="button" value="SUBMIT"/>	

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

**Selected Sub-Grantees**

Sub-Grantee	Sub-Grantee Code
<input type="text"/>	
Swap Sub #1	
Swap Sub #2	

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.

Grant Access Grid			
	Sub-Grantee	Sub-Grantee Code	State
<input checked="" type="checkbox"/>	Swap Sub #1	SS1	Maryland
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland
<input type="checkbox"/>	Swap Sub #2	SS2	Maryland

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:

SUB-GRANTEES	
<a href="#">Back</a>	
<input type="text"/> Search by Sub-Grantee Name	<input type="button"/> SEARCH
<b>Filters</b>	
City	<input type="text"/> Search by City <input type="radio"/> Yes <input type="radio"/> No
ID	Sub-Grantee Name
99000241	DC Subgrantee
99000162	Swap Sub #1
99000164	Swap Sub #2
99000166	Swap Sub 3-1
	<input type="button"/> City

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

## DC Subgrantee

[Summary](#) [Related Actions](#)

### Sub-Grantee Summary

Sub-Grantee Name DC Subgrantee

Sub-Grantee Code DC001

Date First Active 04/08/2021

City Baltimore test

Region

Date Last Active

State Maryland

Active Yes

### Administrator Info

There is no active administrator for this organization.