

SCSEP GPMS Training Module 4A-Case Management-PRAs, Case Level Links & Related Actions

Byrd, Jada M - ETA CTR 0:05

Alrighty then.

Recording has started.

If you consent it to being recorded, you can now turn on your cameras.

I will give you all a moment to do that.

Please also note that during the question and answer portion of today's session, if you have any questions, please raise your hand and we will unmute you so you can ask those questions, now I will hand it back over to our lovely trainers.

McNeace, Meche - ETA CTR 0:36

Thank you, Jada.

Thank you for that.

Also, we also want to let you know that during the question session at the end of our training, you can always please put your questions in the chat as well.

So welcome everybody to the GPMS training case management module, case level links, sub links, participant required actions and related actions.

This session will guide you through the variety of the case level and sub level links within the system.

These links serve as your gateway to a range of essential functionalities.

It will also enable you to view comprehensive information and perform necessary actions directly related to each participant's specific case.

We will provide step by step instructions to ensure that you navigate and utilize these tools to streamline your workflow.

So before we get started, I want to go ahead and introduce myself.

My name is Michi McNeace.

I will be your trainer today and my co trainer who is the system navigator is Joyce Barclay.

So there she goes.

But before we get into the case level links, I want to note that on the case level links they are slightly different between an active participant and an exit participant. An active participants links will have a total of 6 links, whereas a participant who has exited will have a total of 7 links. So with that being said, I'm going to go ahead and say Joyce, let's go into the system so that we can show them those two differences.

There we go.

So before we want to go ahead and before we get started, we are at the cases page and what do we always do when we're at the cases page is that we go and show filters.

And hit reset.

Just a habit.

We should get into that habit.

All right.

So let's go and find an active participant.

Joyce has one up and let's go down to the case level links.

So case level links this is.

I'm going to have to give credit to Pat. Pat Wilkins, who's also part of our training team.

When we started doing training, we were trying to wonder, what do we call these links?

And she's the one who came up with the case level links, which makes great sense as to why they're called that. So, the case level links are the links underneath the participant names.

So it starts off with summary assignment.

Participant required actions, participant history.

Extensions and related action.

So as I mentioned, an active participant will have six case level links.

Now, if we were looking at a participant that was exited. So Joyce, do you have an exited participant?

An exit participant will have a total of 7.

You'll see the summary assignments, participant required actions, and the addition is the placement and follow up link and then of course the participant history extension and related actions.

So those are the difference between an active and an exit participant.

So for this training, we are going to focus all of our kind of demonstration on an active participant.

So if we can go to your active participant.

And we're going to show the first case level link which is summary.

So from the summary page you can view the participant summary information and if we can go down slowly.

And any services that may have been provided to that participant.

Also underneath, if we go back up next to the second summary you will see sub links and these sub links are intake, eligibility, recertification characteristics and other enrollment information. These are those sub links that were that was covered yesterday during the creation of new cases.

But we're going to go through them quickly together today. So let's start first with intake.

And since we're focusing on an active case, an active participant the intake page will

appear, which will be will have the ability and once you click on intake, let's click on intake.

So, or an active participant, you will have the ability on the intake page to do some edits if you need to. Not all fields can be edited, so let's go through each one.

Let's go with the case details and you can see the edit button there.

And from here you can only edit the application date in order to edit the application dates you would have to click on the X which deletes the date.

And now you would have to put in your new date.

X marks the spot.

Yes.

And then click save.

All right. The next one is the participant information.

And we'll go ahead and click on that edit.

So the participant information you can edit like the primary phone number.

Alternate phone number, e-mail and employment status, as well as enter or edit the adequate connectivity and adequate device.

So from here, if you needed to say, OK, they don't have an adequate device, we want to change it to no.

Or if you had a different e-mail you can put in a different e-mail there.

But what we're going to do is just go ahead and just hit save from here.

And so you can see that information was changed and saved.

Now the next one is pilot program enrollment.

This too it can be edited where you can change it from no to yes or yes to no, however under the pilot program enrollment, this section is only intended for a selected group of nine grantees who have been awarded a sector based pilot project.

So no one else outside of those nine grantees should change the pilot program enrollment.

So it should always remain no for those.

All right.

So we're going to leave that and skip that and go to the mailing address, which also can be edited. So, if we click on the edit button.

And you can change any open field that becomes visible for you to change.

So you could change the address the state, county of residence so on and so forth.

Added address line 2 if needed, or even the four digit or your ZIP code.

So in this case, we're not going to change anything. We're just going to go ahead and hit cancel.

And then we go down to the secondary contact, which is also editable so we can click on that.

And from here.

You can check if you have a secondary contact and if you do you check there, then it opens up the field where you can add additional contact information for your secondary contact.

Usually this is the person that we would contact in case of an emergency. Contact things of that nature. So, in this case, we're not going to go ahead and enter anything here. We're just going to go ahead and hit cancel.

Yes. And then the next build is the participant demographics.

So we're going to go ahead and hit that edit button.

And here you can do some edits as well.

You can change did the participant identify their race.

Change it to yes and then of course you would have to click on the appropriate race.

Nationality some if you click on you can click on multiple as Joyce was doing.

So if we go down.

If you click on Asian, it does ask for the nationality.

There's additional box that popped up as you can see.

So in this case, I don't know if Joyce wants to save or cancel that.

I'm going to leave that up to her.

All right, so we're back up top.

So let's go to the next sub link, which is eligibility.

So from here you can view the data, but there is nothing that you can edit from this page.

However, from here you could perform the recertification by going up top and clicking on the recertify case button on the top right corner.

Also know that you could do the recertification for related actions which we will cover later.

So let's click on that button.

Let's click on certify case.

What comes up is these recertified cases page and you can see where you can enter the recertification information here under the recertification detail, we're going to go through this when we get to related actions, but this is just an example of the multiple places within GPMS where you can perform some tasks from different areas. So we're going to go ahead and hit close.

Go back up and then we're going to go and click on the next sub link which is recertification.

From the recertification page here, you will be able to view the history of all recertifications that have been conducted.

Which you can also edit it if there were recertifications. In this case there are no

recertification that has occurred, so there is nothing to display.

So let's go back up to the next sub link and click on characteristics.

The characteristics field page here.

Those you can see can be edited.

There are rules that where you will see all of the characteristics and we're going to go ahead and start with priority of service and let's hit that edit button on priority service.

So here you can go ahead and if you need to make some edits and just to say for instance, that the priority of service, the veteran status, it should have been yes.

But you had no.

Then you would select the let's put no.

All right.

And let's go down.

That's going to be the only edit we're going to do for this section here.

Also note that anytime you're in the priority or service, you're going to see a yellow pop up where it's related to limited English proficiency, because if you select low literacy skills up top, you cannot select limited English proficiency.

Therefore, it's automatically grayed out to no.

Alright, so Joyce, did you want to save or cancel this?

Let's go down to the most in need waiver factors and click on the edit button.

So once you click on the edit button, you're going to see this red note in red that says waiver factors and last updated dates can be updated from the related actions tab, which means you cannot do any edits or any updates here you have to do it from the related actions tab.

So let's go down.

But you can view what you have now.

It'll show you what you've selected who has what waiver, the participant.

Which waiver factor they have.

And then the dates will show you the date of the last update.

So if we go down.

And let's go to other characteristics and click on the edit button.

And here you can edit any open field as well too.

So if let's just say for supplemental Social Security down here, Joyce, you accidentally hit SSDI when it should have been SSI.

And so you want to go back and change it, so you click on SSI.

And then let's go down.

And the education you put in the wrong education, so you need to change that too.

And we're going to go ahead and make that go down to complete at 12 years high school diploma.

How's that go down to high school diploma.

Either one, it doesn't matter, Joyce.

And once that's done, you would click on save.

Let's click on save Joyce.

Alright, so that information has been saved.

The next one is other barriers to employment.

Let's go ahead and edit.

Same case you can click on two areas here that you can change or edit if you will, which is the greatest social need.

Or displace homemaker.

So we're not going to change that.

We're going to leave it as is, and so let's just click on cancel.

Thank you.

Then we're going to go back up top, and we're going to go to the next sub link, which is other enrollment information.

The other enrollment information you can also do edits here as well. So you do have the Co enrollment.

We can click on the edit button there and if you need to change any data there you can do so.

You can change Co enrollment and let's just say in VR education program on the right from a no to a yes.

Then go down.

And then there is participant interest job code.

Joyce mentioned this yesterday that for the participant, you can select up to three job codes for the participant, and right now this participant has food preparation, healthcare, and personal care.

And let's just say if you wanted to change that.

To something else, you just go to the drop down.

And select the again, you can only select three so you'll have to un-select one and select the other right.

And then go down and we would click on save.

And then the last one on this page is program introduction. If you needed to change the pre assessment date or the program overview date, you would do so here and you could just click on the edit button.

And to change the date you will have to delete the date there by clicking on the ** marks the spot and put in a new date.

So we're not going to go ahead and do that now and we're just going to go ahead and click on cancel.

And there you have it.

Let's go back up top.

And that is where we see all of those little sub links under the summary.

So now we're going to go back to the case level links up top under the participants name and next to summary, the next case level link is assignment.

Let's click on assignment.

From the assignment page, you'll see the participants summary information and if you go down you can see the assignment details.

So the details on this page can be changed or edited and I meant by the assignment details and if you want to edit the assignment details.

Joyce would need to go down and click on an assignment ID link.

And go ahead and click on whichever one you want choice.

So it opens up the assignment detail here. As you can see.

So it shows the host agency, Community Action and you just click on the edit button.

And go down and here is where you can make some edits if you need to. So, if you needed to change, let's just say there was a site name and location that you needed to put in there that was different. You can do so from there if the survey contact person has changed.

You can go and select a new survey. Contact individual.

And also note from here is where you can go and end the assignment as well by putting in the assignment end date.

So I don't think Joyce wants to do that at this point in time.

Correct, Joyce?

So if you go back a little bit above the assignment detail, the blue box, you'll see the assignment detail also has sub links and those sub links here. If you see our proof break training and services and paid hours.

From here, you can go and put in a break.

Add any training and services or even do paid hours.

So let's click on approve break.

So below you'll see all of the breaks. If there are any breaks attached to this participant, you'll see if those breaks or those breaks will be listed here.

So if you want to go and end a break, you would click on a break that is open or you can also add a break.

So in this case, let's go and this break has been closed and ended.

So if you want to look at this break, we can click on the break.

And you can see that the break started on 10/15 and it ended on 11/12 and this person took a break due to family health. If you click on the edit button.

You can edit the reason for approved break if you need to, you can't.

You can change the approved break start date and the actual start date that you would just go ahead and you would delete the dates and enter the new dates and once you've done with that you would click save.

In this case, we're just going to go ahead and cancel that.

Now from here if we go up top you can also add a break, so if we go up to the top right and click on add a break.

We can go in here and add a break, so let's do that.

Let's do an assignment.

Click on the assignment.

So you're going to click on the open assignment. There you go.

The approved break start date.

Let's just do today, Joyce.

And then next, we're going to reason for approved break.

Let's say it is other.

I choose other cause if you click on other you have to put down what the reason for.

What is the reason for others? So in this case let's just say temporarily out of state.

So we're not going to put an expected end date or an actual date or is documented documentation provided.

So we're not going to put that and we're going to go ahead and click on save.

And as you can see that break if we can go up to see the break, we would have to click on the assignment ID.

And approved break.

And you'll see that data prove break is added right there.

But if we go all the way up top again, Joyce from here, you can also see the status bar has changed to active on break as well too.

So in this case, so we're going to continue to use this participant.

So I'm going to ask Joyce to go back to that break that we just added.

The temporary out of state, and we're going to go and delete this one.

All right.

And then as you can see, Are you sure you want to delete this break? Yes.

There he goes.

So let's go back.

You can see that the break is deleted, so the next if we can go back down.

The next sub link is the training and services.

Under training and services, this is if there are any services that were provided, you would.

It'll be displayed here.

So in this case there were none for this particular participant.

So the information displays if there are information, you'll see the category, the type, who the provider is the start date, and if there's an end date. So in this case, let's go up top, where you can add an assignment service by clicking on the add assignment service button.

And it will take us to the add new service page.

And if you go up top, you'll notice that we have been navigated now to the related actions page.

All right, so assignment services are either supportive services and or education and training.

We'll go through both and, but we're going to add a supportive service and an education and training.

So let's start with adding a supportive service.

So let's go ahead and complete this field.

You'll go and select your assignment.

And open assignment. Your category would be supportive services.

And then the type.

Once put food assistance.

OK, the next required field.

We're not going to fill in the ones that aren't required, so the next required field is the percent support service paid by grantee.

So this means if the grantee had paid for the food assistant support services, how much of it did they pay? In this case, we're going to say it was paid by the grantee 100%.

So we'll put 100% in there.

And next, we're going to do start date.

And is this a one-day service? Let's say yes.

And when you select yes, you'll notice that the expected end date and the actual end date automatically populates for you.

And let's go down.

So you'll see additional field at this point in time. You're not required to put in the provider.

So we're not going to put in the provider for the supportive services, but you are required to go over and select the support service provided by. In this case we talked about it with the grantee. So let's select.

Click on the grantee.

If you were done, you would go ahead and say save and close, or if you wanted to add another service you would hit save and add another.

But we're going to go ahead and add another.

So let's click on save and add another.

And we're going to go and add education and training this time.

So let's select the assignment date.

Categories, education and training.

Type let's do computer training.

And we are going to go to the percentage and let's just say that the grantee you have another provider who's going to provide the computer training.

So there were no percentage support by the grantee. We're going to put 0%.

And then down to service details.

Put in the start date.

We're going to leave expected end date and actual end date alone and then just go to is this a one-day service and we're going to say no.

Let's go down.

All right. So the provider this time, we're actually going to add a provider.

So what we've learned here, when you go to add a provider that any grantee or any user can actually access provider information nationwide just by selecting, you know the different states.

So if you click on the state drop down.

You can select states that are outside of your States and this is very helpful for those national grantees that do serve multiple states.

So what we're going to do is go ahead and Joyce select. I believe you like California.

Is that correct?

And your city? Is it San Francisco or Fresno?

Which one are you going to?

All right. So did we spell Fresno correct?

And then your organization, you can either put in an organization that you're looking for the first, the 1st letter, couple of letters, or the full name, or part of the name, and then hit search.

So nothing. So, with an E.

So it what will come available is any organization that has the letter E in it. So in this case it was Jude's house and is that the organization you're looking for, Joyce?

If so, please click on the box and it turns blue, and then you would select organization.

And you see that the organization has been added and we are done adding services.

So we're going to click on save and close.

And there you have it.

Let's go see.

So if we want to see the services that provide it, we as Joyce as she clicked on the assignment ID and then she's going to click on training and services.

And now under training and services, we show the supportive services that we put in

and now the education and training.

All right.

That's great.

So let's go back up to the top, and we're going to go to back to the summary.

We need to go back to the.

Where were we, Joyce?

Where we had the other.

Sub links.

Barcley, Joyce M - ETA CTR 31:23

Was that an assignment?

We were in the clicking on the assignment.

McNeace, Meche - ETA CTR 31:28

It's time.

Let's go back to the assignment.

Barcley, Joyce M - ETA CTR 31:30

We have the sub links.

McNeace, Meche - ETA CTR 31:30

Alright, there's your sub link.

Alright, so the last sub link under assignment would be paid hours. Let's go there.

All right, from here you can enter the paid hours as you would in managed paid hours from the Admin Council. However, using paid hours from the assignment link will be exclusive to that specific participant, whereas in paid hours and managed paid hours in the admin council is where.

You can enter hours for all your participants.

The paid hours would open and will default to the first assignment in the program year.

Normally correct and that's what we show here.

All right.

You can only enter our edit hours for this one.

We are in.

Which assignment choice?

Jude's house.

All right. So, for Jude's house, you can see where you can click on the edit button.

And you can edit the hours for any hours that were put in prior to for quarter one, quarter two, quarter three or you can go ahead and enter hours for quarter four. So in

this case, we're still in quarter 4.

Let's put in that the participant.

Had page training in person and put in four hours.

And then you can click on save and you can see that the total has been added.

Yep, 11 hours.

And there you go.

So we can also go where if we wanted to.

Do change the paid hours for the other assignment, Joyce.

What would we need to go from there?

Go to the breaks.

Barcley, Joyce M - ETA CTR 33:36

No, I think it this should be a hyperlink to let us in there.

Sometimes it has to do like a little reset.

McNeace, Meche - ETA CTR 33:44

All right, let's do that reset.

There we go.

Paid hours.

So this is for the open assignment dates 9/21/2024.

Community action services.

So we can, we're still back at Jude House.

So now we're on Community Action services. There you go.

8 hours.

Barcley, Joyce M - ETA CTR 34:22

Nope. We're still back on Jude House. This doesn't usually happen.

McNeace, Meche - ETA CTR 34:25

Alright.

OK, we were testing this earlier and also note our disclaimers that we are working in the training site.

So sometimes when you know we're going back and forth, it may not catch up to where we are. So sometimes if we go back out and hit on summary again and then come back in, but this gives you an idea of where you could put in paid hours.

For your specific participant, by going through the assignment page.

So let's go back up to the case level link.

And if there's any questions later, we can always go back and show you again.

So the next case level link is participant required actions.

Let's click on that.

So from the, from the participant required actions you will see.

The five PRAs below, which are orientation.

Offer a physical exam.

Participant safety consultation.

Assessment and reassessment IEP.

And annual program overview.

Participant required actions are those tasks that must be completed for all active participants throughout their tenure in the program, with the exception of orientation, which is done at the same time of new enrollment.

Additionally, remember that participants that are engaged in PRA activities must be compensated for the time spent in each of those activities.

So let's go to the first PRA, which is orientation, and let's click on that.

On the orientation page to add an orientation date, you would simply just click on add new. But in this case orientation.

There's orientation, so let's show. Let's go back and in this case, a participant had already had an orientation. So to show you how to add the orientation, I'm going to ask Joyce to click on delete the red trash can.

Just get rid of it, Joyce.

All right, now we can go and say add new click on the add new.

Enter the orientation date.

Any dates you'd like.

Actually, enrollment data is 5/31 put there you go.

And provided by, we always recommend that you use the case manager's name and not use something generic like case manager or representative and then hit on the green save icon.

And there you have it. The orientation data saved.

All right, let's go up and let's move to the next one, which is offer a physical exam.

The offer physical exam.

This PRA requires action to be taken annually.

All fields are required, so to add an offer physical exam as we can see here this participant has already had one offer, but we're going to go and do and this is going to be year #2.

So we're going to add a new offer and click on add new.

Enter the date of the offer.

And then you would click on yes or no. Did the participant decline the offer of physical exam?

Yes. And of course, the case manager's name.

And click on the green.

Save icon.

And to see that sometimes you'd have to go back out and click on, wasn't it the summary?

And then come back in Joyce or to show this you can click on show history with that show.

Barcley, Joyce M - ETA CTR 38:43

Yep, it just it's displaying below it now.

That's not that. There's more than one.

McNeace, Meche - ETA CTR 38:45

OK.

Barcley, Joyce M - ETA CTR 38:46

It's displaying the history link.

McNeace, Meche - ETA CTR 38:50

All right, so if you click on the history link.

There you go then.

It'll show the history.

Perfect.

All right, let's go to the next PRA, which is participant safety consultation.

So the annual safety consultation must be conducted with the participant at the host agency, and this is another one of those PRA, as that has to be done on an annual basis.

So, we show that the participant had one and we're going to add the second one, so click on add new.

Same thing, add the date.

Add the case manager's name and then click the green save icon.

And then show history.

And it'll show that we have the two in there. Perfect.

Right now, let's go to the next PRA, which is assessment and reassessment IEP.

This is the section where you would enter first the initial assessment that was done at the time of assignment, initial assignment, and then also any subsequent assessments.

So please know that the rule is that assessment must be done twice within the 12 month period. So in this case we did have one in there.

So we're now going to do another one.

So we're going to add click add new.

The field would open up for you and then you would enter the reassessment date.

And then at this point in time during your assessments, you will determine whether or not that participant needs supportive services, which is a requirement. And this case for supportive services. We're going to say yes.

All right.

And then for the next section is transition planning.

The transition planning this is uses when a participant is about one year from reaching their individual duration of limit.

This is when you should begin their transitional planning and their transitional IEP should reflect those steps that you will do to prepare that participant to exit for durational limit.

So that's when you will the date that you would put in. Here is the date that you start the transition planning.

So we're not going to do that here.

The next one is the IEP date. As you can see, the IEP date is not required. However, this field does need you to put in the date.

So let's put in a date.

That you did the IEP.

There you go.

And then, of course, the provided by.

And the save.

And there you go.

And the reason why we have now navigated to the add new service is because we selected that we determined that this participant needed supportive services.

So what it'll do is it'll take you to the add new service and this is where you would add the information for the new service.

And so we're going to go ahead and do that.

So select assignment.

And the category is supportive service.

Let's pick on type.

And let's do transportation assistant at the bottom.

Service date is the same date that.

Is it going to take?

All right. We're not going to add in expected end date and then we're going to say this is a one day service.

And you can see that the expected end date and actual end date was automatically populated for the same day and if we go all the way down.

We're not going to add the provider, but we do need to again select who provided it. In this case it was put in workforce partner.

And click on save and close.

And then if you want to go back and see where you can click on assessment and reassessment again, correct choice.

And you'll see where the supportive services was added. And if you click on show history, if there were any more, it would show all of the history there.

Now.

Let's go back up to the top and go to the last PRA which is annual program overview.

This is not a required field. The program overview should be conducted at the time of initial intake and orientation. However, if you provide an overview, let's just say during recertification you do a reorientation that can be considered as a program overview.

So in this case, if you do that, you can note that here by add by going ahead and saying add new even though you do have one there.

But we're going to go through the process, add new.

And we're going to say reorientation during research.

And then click out of there and then click on the save button. And as you can see it automatically populated the date and the updated by.

And there you go.

So this concludes all of the participant required action section.

So now we're going to go back up to the go back up to the case level links, and we're going to hit on the next case level link, which is participant history.

So once you click on participant history, it's just going to show you just that the participant history. This will display the participants summary details and the history which shows the case ID, the grantee, subgrantee, application date, the status and any exit date. Also, the assignment history and break history is listed below as well too, and then you'll see the training history.

So again, like I said, it's the full history of that participant that you would see.

On the participant history page. So if we go all the way down, that's it stops at training history.

So we see all of that.

So if we go back up top.

And we're going to go to the next case level link which is extension.

The extension page will provide you information on whether the participant has received an IDL extension or individual duration limit extension.

Extensions are provided only for those grantees who have an approved IDL policy. That allows for extensions beyond the 48 months. So please note that case managers supervisors.

And sub grantee administrators.

They cannot add the extension, only the grant administrator has that ability to do so, which is done through the duration of limit extension utility on the grantee administrators admin Console. But you can view any extensions by going up to the top right and click on view extensions.

And if there were any extensions, it will show here and in this case this grantee has no extension, so no extensions can be added per the current durational limit policy.

I think that's pretty cool.

All right, so let's go up to the case level links again and go to the next.

Which is related actions.

From here, please note I want to let you guys know that the related actions list will change based on the user role and the participant status.

So.

Sub case managers and case supervisors. They will see a set of related action whereas the SGA and grant administrator will see a different set of related actions.

And I wouldn't say different, but they'll have additional.

Links that they can utilize from related actions.

So also what we will see here are available related actions that are associated with the case manager supervisor. So, if a GA related actions pop up, what we will see in addition to what you see now with these like move a case and transfer case will show.

And if a participant is and when mentioned that the participant status, what you see here is what is for an active participant. If a participant is in exited and close or exited and follow up, you will see that the that the list will change and what you'll see and instead of seeing add exit .

You can point to that, Joyce.

It'll show modify exit.

And also if a participant is on a wait list, the related actions will only show three actions that can be taken then that would be add assignment, withdraw a case and manage program introductions.

So for today, let's just go through the related actions that we're that are associated with an active case and that is what we see here.

So we're going to go ahead and click on add assignment.

From here you can add an assignment from the related actions, which is the same steps that you would take when you add an assignment from the participant cases page that was demonstrated yesterday.

We're not going to do that here.

It's going to be pretty redundant, but it's basically entering all the information that you need to add an assignment to that participant.

OK, also from here.

Go back up Joyce.

So also from your added assignment page you can also go in here and go down go down.

All right, down, down, down, down.

Sorry, Joyce.

We're going to go ahead and hit cancel.

There you go.

I was looking for the cancel button.

Alright, so the next one is add assignment service.

We just kind of finished talking about ADS assignment service, but you can see from the related actions page we can also add.

Assignment services which are supportive services, education and training, and so from here earlier we went through adding a supportive services and we also went through adding education and training. So, in this case we will need to go through that again unless somebody would like to see it again.

But I think at this point in time, we can just kind of not go through it because earlier we did both supportive and.

Education and training.

So let's go ahead and click cancel.

And go and click on add. A break is next.

So we too have gone through this process during the case level links. So the summary sub link, the process is always the same, but this is yet another area within GPMS where you can perform some functions or do you know perform the same functions throughout different entries through.

GPMS.

So let's go through this again real quickly.

And so let's complete the required fields.

Let's click on the drop down for the assignment.

Pick that one.

Select the open assignment.

Next, let's select the reason for break.

Let's do family and health again.

And let's enter the date.

The break will start.

And.

Click on save.

Action complete and we are now back at the related actions page.

So if we click on this summary you will see the blue statuses.

Now for that participant active on break.

Before.

Let's go back to that.

Can we go back to the break?

Joyce.

Barcley, Joyce M - ETA CTR 53:23

Do you want the one that we just did or in related actions?

McNeace, Meche - ETA CTR 53:25

The one we just did.

Barcley, Joyce M - ETA CTR 53:28

OK.

McNeace, Meche - ETA CTR 53:36

For a break, there you go.

And the one we just did is I believe is that one?

Yep. And let's click on the break ID.

And actually I just want you to go ahead and end that break. So you click on the edit and put in the actual end date.

And click on save and that break was ended.

All right, so we go back and see that the actual end date was entered and we're good and we can go back up and go back to related actions.

And the next one, let's do manage waiver factor.

So from here you can update the waiver factors for this particular participant.

You will select whether that participant's prior waiver factors may have changed or not.

So you would click on each waiver factor listed below and then the date of the last waiver update.

So in this case, I believe severe disability for this participant was no, that hasn't changed.

Let's put no frail was no.

Old enough, not receiving Social Security.

That's no.

Severely limited employment prospect in an area. Persistent unemployment no.

Limited English, no?

Low literacy, yes.

And a pop up will show where it says because low literacy skills is, yes, limited English proficiency must be no.

OK. And you will also see that formally incarcerated and 75 and older is grayed out.

You cannot change that.

So let's go back up and put in the dates of last update.

And click on save.

Action completed and now we're back to related actions.

So if we want to go back and see whether those waiver factor updates took, we can go back and click on waiver updates or waiver factors. I'm sorry.

And there you go.

The dates are there.

All right. If we can go back up to related actions and click on the next action button, which is view extension.

So from here.

You can view only case manager's supervisors.

You can view only you'll be able to see if any extensions were provided in which program year, and whether waiver factor was updated.

So if we select this, I also know that this grantee has no extensions can be added as per their durational limit policy.

So we would not see anything cause they do not provide extensions.

Right.

Go back to related actions.

And the next one would be add exit.

So you would go here to exit a participant.

This can be done from the related actions page. Since this is part of the next training modules, all things exit which will be on May 22nd.

We're not going to go through this process today, so we just wanted to show you where the add exit is located from the related actions.

Tab. So let's go back and let's click on cancel here.

Then we're back to related actions and let's go to manage paid hours.

You notice we talked about managed paid hours from the Admin Council, from the assignment page, and now from the related action.

So here we covered the managed paid hours, but also note again there are several areas within GPMS that you can perform the same functions.

So in this is one of those cases too.

So we did go over the manage paid hours. We can enter hours here for that participant.

And so on and so forth. So in this case, we're going to go ahead and just exit out of here.

Go back to related actions.

And next click on Recertify case.

Now I believe this was not covered in yesterday's training.

So what we're going to do is we're going to go through this today.

So we're going to go ahead and recertify this case.

So we're going to go ahead and enter the recertification information here.

We're going to put in the recertification date.

Number and family.

And the method we used it, we do 12 months or six months, 12 months, OK. And then the total income, let's put in zero.

And as you can see that the system automatically gives you what the threshold is for a family of one to be at 125% of poverty, which is 19563.

And since we put in 0 income for 12 months for a family of one, you'll go over to the right under application date and the system automatically noted that the participant's income is at or below 125% poverty level and it automatically clicked yes. Then we go down to the bottom where it says signature participant on recertification. We're going to say yes.

And we're going to click on save and continue.

And you see in the green as you do when you do any eligibility, it showed that the system eligibility determination is eligible and the reason for eligibility unemployed below or at 125% below poverty and the participant age, of course. And so, at the next step is recertification eligibility determination. We're going to say yes.

And then we're going to hit submit.

And the pop up will show that the supervisor will now review the request and make the final decertification determination or decision.

Do you want to continue?

And yes, we want to continue just like your initial eligibility, every recertification at the case manager's level has to go through the supervisory approval process.

And so there you go on recertifying a case.

So if we go down, you'll see the recertification submission and you'll see submitted cases.

It was submitted on this day.

The participant name the ID.

The case ID, date of birth and information that you'll need to know date of enrollment case assigned to and Munson program.

If he skipped any cases, it would be shown here as well too. I don't think we've ever seen anywhere we skipped any cases, have we, Joyce?

Barcley, Joyce M - ETA CTR 1:02:03

This is when you do multiple submissions from the from the cases page and the action items you can select more than one participant to certify at the same time. Or to put through process the eligibility at the same time and then you would have a list in both.

McNeace, Meche - ETA CTR 1:02:05

Mm hmm.

Barcley, Joyce M - ETA CTR 1:02:19

Of these areas.

McNeace, Meche - ETA CTR 1:02:21

Those that were submitted and those that have not been submitted yet, all right.

Barcley, Joyce M - ETA CTR 1:02:23

Mm hmm.

McNeace, Meche - ETA CTR 1:02:25

Thank you.

All right, so let's go back up.

And that's how you recertify your case and click on related actions again.

And we're at the last action button which is manage program introduction.

Click on that.

Again, this is another area where you can enter the dates for the program introduction, which are the pre assessment date and the program overview date.

And it could go ahead if you select that.

You want to go ahead and enter those dates? You can put it there. If not Joyce, you can just hit cancel.

And there you have it.

We have covered all things related to case level links. The sub links within each case level links, participant required actions.

And we just finished up the related actions.

So we hope that some of the key takeaways from today's training is that you have a better understanding of the interconnectedness of the case level links, the sub links, the PRAs and the related actions.

And how they kind of all connect to each other? These features provide multiple pathways to access an input participant data. As we've shown you.

So ultimately, we hope it'll give you a more comprehensive view of a case and its associated activities for you to manage your cases within GPMS.

So with that being said, we are at the end of this training and we are going to go ahead.

And open it up for questions.

And as noted earlier, when we first began that if you have any questions, please put them in the chat. If you would like to verbalize your question, just raise your hand and we will help get you unmuted.

So now we're going to go ahead and Chanel, you can go ahead and see if there are any questions in the chat.

Davis, Chanel T - ETA CTR 1:04:33

Yes, we have a few in the chat.

McNeace, Meche - ETA CTR 1:04:34

And.

Davis, Chanel T - ETA CTR 1:04:35

Oh, I'm sorry, Michi.

You were saying something else.

McNeace, Meche - ETA CTR 1:04:37

Now I just wanted to make sure that Joyce keeps the system up.

Davis, Chanel T - ETA CTR 1:04:38

OK.

So first question was from Louise.

The question is, can you change the last name if they're married or divorced?

McNeace, Meche - ETA CTR 1:04:53

The intake or is it the intake page?

Joyce, can you click on intake?

What's the participant information?

Can we click the edit?

The name cannot be changed in order to change the name first, middle or last, you would have to submit a Zendesk ticket.

As well as the date of birth. If for some reason you made a mistake with that as well.

You're right.

Davis, Chanel T - ETA CTR 1:05:33

Great. Thank you.

So the next question is how do you know that the percent support service paid by grantee is 100%?

Is it always the case?

McNeace, Meche - ETA CTR 1:05:44

No, we just made.

We made that up.

So if you're providing, let's just say a supportive services and if the grantee provided transportation and the grantee has an arrangement with a partner where they provided 50% of the cost of that transportation, let's just say they were.

Metro passes or subway passes, and the grantee paid 50%.

You can put where the grantee paid 50 percent, 10% zero percent.

That so that is determined on you.

Davis, Chanel T - ETA CTR 1:06:17

All right.

McNeace, Meche - ETA CTR 1:06:17

I hope that answers the question.

Davis, Chanel T - ETA CTR 1:06:23

OK, I'm going to move to the next question. It is.

Can we really buy food with SCSEP funds?

I thought we needed to send participants to apply for SNAP funds.

McNeace, Meche - ETA CTR 1:06:34

So when we selected food assistant, it doesn't necessarily mean that we provided them with food.

You know, we didn't go and buy them dinner or take them and buy them groceries.

Maybe you gave them a gift card to the local grocery store and you called it food assistance.

So there you go, Rita.

I hope that helps.

She'll let me know if it doesn't.

Davis, Chanel T - ETA CTR 1:07:08

OK. All right. Next question.

Can you edit and remove a support service entered by mistake?

That is, that is now showing up in my task.

McNeace, Meche - ETA CTR 1:07:20

Yes, we went in there where we showed where we, I had Joyce delete one too.

Can you go?

Joyce is going in there.

Looky.

As she went to training and support services, did you see the supportive services and let's just say we wanted we entered the since Rita brought up food. Let's say we're going to delete the food assistance one.

You just go ahead and hit that red trash can.

And then go back. I think this is one where you have to hit summary and come back in or something like that for it to reset.

And there it is. It's gone.

Now if you want to edit, you would click on the blue link.

Let's click on education and training one.

And you see their edit button, you click on the edit button and you can go in there and edit that as well too.

And then once you're done editing it, you just hit save.

And it's all done.

OK.

Davis, Chanel T - ETA CTR 1:08:46

Alright. Next question, if I had digital training as an additional service covered 100% by sub grantee, where do I place those hours?

McNeace, Meche - ETA CTR 1:09:03

Run that Joyce is going to show that there you go.

Paid hours.

Barcley, Joyce M - ETA CTR 1:09:23

What was the type of training?

Davis, Chanel T - ETA CTR 1:09:26

Digital training.

McNeace, Meche - ETA CTR 1:09:32

If it's digital, meaning if it's in person or remote, so digital could be like it's still training either way.

Barcley, Joyce M - ETA CTR 1:09:35

How?

Hmm.

I was thinking of digital as remote, but yeah.

McNeace, Meche - ETA CTR 1:09:47

Yeah, either one.

But that's where you would put the digital training hours, either in pay training in person or pay training in remote.

Davis, Chanel T - ETA CTR 1:10:01

Right next question. When updating waiver factors for PY 2425 recertification, the last updated date updated date boxes are prefilled with dates.

Is that supposed to happen?

McNeace, Meche - ETA CTR 1:10:18

When updating waiver factors for program year.

So we're in program year 24.

Davis, Chanel T - ETA CTR 1:10:26

Research.

McNeace, Meche - ETA CTR 1:10:26

But they're talking recertification, the last update box are prefilled.

So is it updating waiver factors or doing a recertification?

So if we'd go and look at, let's look at waiver factors for this participant, Joyce.

Related actions manage waiver factor.

Barcley, Joyce M - ETA CTR 1:10:59

Because it's PY 24, it was updated in PY 24.
So those are the last dates that are displayed.

McNeace, Meche - ETA CTR 1:11:04

Mm hmm.

And those are the.

Barcley, Joyce M - ETA CTR 1:11:08

You can't.

You can't overwrite those dates. If you need to change them or update the dates.

McNeace, Meche - ETA CTR 1:11:18

So and that's and that said.

Use the word recertification.

So I'm going to assume it was just updating the waiver factors. Now if the waiver go and click on program year 23, Joyce.

And does it show any waiver factor?

There was nothing updated in 23.

Barcley, Joyce M - ETA CTR 1:11:44

They were enrolled in the very end of PY 23, so they the waiver factors weren't updated right.

McNeace, Meche - ETA CTR 1:11:45

24, OK.

Alright, so we wouldn't have any information.

Yeah.

OK.

So I'm going to say that if let's just say we had this participant enrolled in 22 and she selected program year 23, it would show the last date, it would automatically populate. It will show the date of last update if they were done correct Joyce.

Barcley, Joyce M - ETA CTR 1:12:14

Yes, my understanding is yes.

McNeace, Meche - ETA CTR 1:12:16

Yes.

All right.

Davis, Chanel T - ETA CTR 1:12:20

All right.

Next question, do we need, do we need to update the waiver factors after each recertification?

McNeace, Meche - ETA CTR 1:12:31

So the waiver factor requirement is that they do need to be updated within the. What is that choice? The first quarter of each program year?

Is it?

Barcley, Joyce M - ETA CTR 1:12:42

No, they didn't.

No, just Anne Willy.

Just annually.

McNeace, Meche - ETA CTR 1:12:44

Nope. Annually.

So if you update the waiver factors at the same time you do your recertification, that is the decision that was made by you, the grantee or your sub grantee.

Which does kind of streamline things, you know, kind of do it all at the same time.

But it's not a requirement to do them at the time of recertification.

Alright.

Davis, Chanel T - ETA CTR 1:13:16

Next question, can you provide examples of why you would change or edit the application date?

McNeace, Meche - ETA CTR 1:13:23

That's a good question.

We asked the same.

Let's just say when you put in the application date and you put in and you know I'm, I'm good for having, you know, sloppy fingers here. And when I'm typing and let's just say I clicked on the wrong month or the wrong date. In some cases when.

We were going through things that we were preparing for training. We would actually accidentally put in the wrong year. So if you found out you put in the wrong date then that's the probably one of the reasons why you would want to go in there and edit the application date.

You don't want to change it to change it, but you would want to edit it because you've made a mistake.

So let's just say in this case it should have been April 1st, 2024 and somebody May 1st 2024 and we put in May 1st, 2021, then we would need to go in there and change it and make sure it says 5/1.

2024.

OK.

Davis, Chanel T - ETA CTR 1:14:31

Alright. And so, we have another question.

Where can we find training and services programs to offer most of our folks?

Hold on.

Let me start over.

It's broken into two. Where can we find training and service programs to offer most of our folks cannot afford to pay.

McNeace, Meche - ETA CTR 1:14:55

OK. So supportive services and training.

The role for the SCSEP program is grantees should offer participants supportive services, either at low cost, no cost through partners, or the grantee can pay for them out of their budget.

So it is not expected for the participants to pay for. That's the need for supportive service.

Says same thing goes for any training. If the participant part of their IEP and part of their employment goal is that they need to get computer training, and you put them in computer training and there's a cost to it the SCSEP regulations clearly states that you cannot.

Make a participant and a participant should never pay for their training. The program would pay for that.

So the either the program the grantee pays for it or fines.

Other partners that would pay for it, like the workforce, like the AJCs, they would pay under, we owe their programs where they will pay for the training. But at the end of the day, to make a long story answer short is participants should not be paying for their own supportive services or training.

Now if you need to find out, you know what?

What partnering organizations can you connect with that can help offset those costs for training and supportive services?

I would suggest that maybe you can check with your colleagues or you can send or have

your grant tier sub grantees sent in a inquiry to your FPO and then your FPO can work with you guys on helping you identify what are different resources that you can access. But there are tons of resources out there.

Your AARP senior centers, the local AJCs, and I believe Joyce is getting ready to jump in there.

Barcley, Joyce M - ETA CTR 1:16:57

I was just getting ready to say the AJCs, but also remember all SCSEP programs are partners with the whole workforce development system and all the partners that work within that arena.

Very often times get together a few times a year and I would attend one of those meetings and throw it out to that group and you might get some because you'll have adult education there, voc rehab there. So, you have a lot of different providers at those.

Regional partners meetings.

They call them partners meetings for the AJCs, and you can get a lot of really good information from them.

Good networking too for referrals.

McNeace, Meche - ETA CTR 1:17:40

Thanks, Joyce.

Great information.

Davis, Chanel T - ETA CTR 1:17:45

And I believe that's all the questions in the chat.

Barcley, Joyce M - ETA CTR 1:17:46

On.

Davis, Chanel T - ETA CTR 1:17:48

Oh, I'm sorry, Joyce.

Barcley, Joyce M - ETA CTR 1:17:50

I have a question about an FPO federal project officer.

McNeace, Meche - ETA CTR 1:17:54

Yes.

Davis, Chanel T - ETA CTR 1:17:55

Oh yeah, see. Yeah, they say FPO.

McNeace, Meche - ETA CTR 1:18:00

Oh, that is, yes, Joyce said.

The federal project officer.

So the person that would communicate with the federal project officer would be the grantee that you are associated with.

Barcley, Joyce M - ETA CTR 1:18:05

How do they do that?

Yeah.

McNeace, Meche - ETA CTR 1:18:14

So if you need technical assistance, you would go through your direct. If you're part of a sub grantee model, then you would go through your sub grantee.

Who then will?

If needed, contact the grantee who then with needed will go through their technical assistance process, which is their federal project officer.

So, and I appreciate Rita adding in the two CFR requirements for uniform guidance on food.

We do understand that one Rita, we know it.

But in this case, like we said, for food assistance, it's not going what the CFR is basically saying is you can't go and pay for food, you know like.

Have a meeting and have food catered and you know things of that nature.

So, but Rita does have a very good point, so we appreciate that.

Do we have another?

Question above.

Davis, Chanel T - ETA CTR 1:19:21

No. Oh yes, my task type bar shows eligibility determination approval while the participant's status is active. At the same time.

Why is that possible?

McNeace, Meche - ETA CTR 1:19:34

Is this a new case or research?

That would be my first question. Wouldn't that be Joyce?

Barcley, Joyce M - ETA CTR 1:19:46

The only thing I can think of is when the case manager forwards the determination to the supervisor.

There might be a different status bar, a different status on the status bar, but I don't recall having seen that.

Does it mean it's not there?

McNeace, Meche - ETA CTR 1:20:03

No, they're saying so.

Yeah, eligibility to shows eligibility determination, approval.

So is it that the eligibility determination was approved and now they're active? The only way a participant becomes active is once they're given and given an assignments date.

That's what makes a participant active if the supervisor.

Approves an eligibility.

Then they go from pending eligibility to eligible.

Now, if an active participant's going through recertification and they're going through the recertification, that participant is considered active.

So, I mean, there's those different scenarios.

Did that help?

I hope so.

Barcley, Joyce M - ETA CTR 1:21:12

I know it's hard when people are can't talk.

Davis, Chanel T - ETA CTR 1:21:15

Yeah. So, Ernest, if you just want to give us a thumbs up or yes in the chat or no if it didn't.

McNeace, Meche - ETA CTR 1:21:21

But also know that you we will.

You can be unmuted if you just raise your hand, and we'll just go in there and unmute you.

No problem.

It's like already written down.

They're adding the FPO to their acronym list. Also know, and here's that plug on workforce GPS. Older workers community of practice.

There is A/C set alphabet suit which has all of the acronyms in there.

So we're going to put that in the chat for you.

You don't have to really create your own acronyms list.

We did that for you.

So let us put where that document is located in workforce GPS for you.

Do we have enough?

Davis, Chanel T - ETA CTR 1:22:08

See, Ernest has his hand up.

So we're going to unmute him.

Alright, if you unmute yourself, then we can hear you now.

McNeace, Meche - ETA CTR 1:22:25

Ernest, go ahead and click on your unmute button.

You want to put something in the chat.

Davis, Chanel T - ETA CTR 1:22:52

All right.

Alright. And while we wait for Ernest, we have another question.

I have had the record locked at the eligibility waiting for approval. When I the approving person, I am wondering if you know what the era is. The help desk had to unlock it, but it happened twice.

McNeace, Meche - ETA CTR 1:23:20

If I had the record lot to those waiting for approval, and I'm approving person, I wonder if you know what the arrow is. The help desk had to unlock it.

Unfortunately, I don't.

Unless Joyce, I know that the Zendesk is very helpful in all of this, but you know, we know that records get locked due to durational limit.

I'm not familiar if a record is locked during an eligibility waiting process.

So if this happened twice, I would suggest that you reach back out to Zendesk.

And ask them.

Barcley, Joyce M - ETA CTR 1:24:00

Yeah, the only locking I'm familiar with is if you're past the durational limit date.

But if this is for eligibility, it's at the beginning of the intake process and not at the end of their duration.

McNeace, Meche - ETA CTR 1:24:16

Exactly.

But there to help.

So in the length I put the direct link to the SCSEP alphabet soup and then to the GPMS alphabet soup.

So all of the acronyms are in there.

Davis, Chanel T - ETA CTR 1:24:41

Catherine says thank you.

McNeace, Meche - ETA CTR 1:24:43

And thank you.

Davis, Chanel T - ETA CTR 1:24:45

And I am oh.

McNeace, Meche - ETA CTR 1:24:45

We now acronyms drives us crazy.

We live in a world of acronyms.

Davis, Chanel T - ETA CTR 1:24:52

It's.

I am not seeing any other questions in the chat and no hands raised at this time.

Oh, here we go.

I see you have I guess added examples of people that are not eligible.

Are we supposed to put in info of each person that shows interest even if we know they aren't eligible?

McNeace, Meche - ETA CTR 1:25:15

I believe the question is, is for everybody that comes in, whether they're eligible or not or you know predetermined, do you have to put them in the system? And that is no, you don't want to do that if they if you do your pre assessment and your pre introduction and you find that initially that participant or that applicant could be eligible.

Of course you have them complete their application, so on and so forth.

And once you make that determination, that and you've done the eligibility, the age, the income unemployed and then once that's done, that's when you would put them in the system. And the only time you would wait list them is if you don't have an assignment to put them into at that point in time.

Then you can wait list them.

But I would not put in those that the only time an ineligible or ineligible applicant would be in the system.

Is that let's just say you were using the system when you were doing the actual intake and you go in there and they give you all of the income information or you put in there that you know, you thought the income met the threshold and there happened to be over.

By \$20 and you put that in, then the system determined that no, they're not eligible because they're over the threshold.

So that will be the ineligible or if you say they were eligible, they go through the process and it goes to your supervisor and the supervisor find that there was an error or something wrong and they deem that person ineligible.

So they would be in the system as ineligible.

Did I get that right, Joyce?

Barcley, Joyce M - ETA CTR 1:27:04

Yes, ma'am.

McNeace, Meche - ETA CTR 1:27:06

Cool beans.

You're saying there's an example that the participant wasn't eligible, so they're like those are those could be those scenarios where they are in the system, and they are deemed ineligible.

The other one is also during recertification. If you go and do during research, you're checking the income again and at that point in time that you find that this participant is over income, then they become ineligible.

So those are those scenarios.

Hope that helps.

Davis, Chanel T - ETA CTR 1:27:53

Nope, I'm not seeing any other questions. No hands raised.

McNeace, Meche - ETA CTR 1:27:57

Other questions?

Barcley, Joyce M - ETA CTR 1:27:59

Well, it's good to know too that folks are really observant.

Didn't even observe that ineligible.

McNeace, Meche - ETA CTR 1:28:04

That's.

Davis, Chanel T - ETA CTR 1:28:05

Very true.

McNeace, Meche - ETA CTR 1:28:08

They're always observant choice.

That's why I'm like, oh, my God, we got to make sure.

Barcley, Joyce M - ETA CTR 1:28:10

I know.

McNeace, Meche - ETA CTR 1:28:12

Just let's just go back to yesterday and your tucan, Sam.

Nothing gets by these wonderful end users. Nothing.

So we are at 3:31 PM.

Do we have any other questions? If not.

We can.

Say oh, so Ira said. It does happen at research.

So yes, that can happen.

All right.

Well, on behalf of our entire training team, we want to say thank you guys.

Thank you for joining us today.

Thank you for joining us throughout all of our training.

We have two more training scheduled. The next one is scheduled for May 22nd, which is on a Thursday from 2:00 to 3:30 PM and that will be on.

Exits placements and follow up and then the last training is scheduled for May 28th and that training will be all on reports and reports and reports. So, we hope to see you on the next two. In the meanwhile, you all have a great rest of your day.

Great rest of your week and upcoming weekend and we'll see you all on the 22nd and thank you for joining us today again.

Thank you.

Do we have a hand up BJ Peters?

Byrd, Jada M - ETA CTR stopped transcription