

SCSEP GPMS Training Module 4 - Case Management- Intake through Assignment 5.15.2025

Burnett, Lauren S - ETA CTR 0:03

You may turn on your camera, at which time the agreement prompt will pop up on your screen where you can accept.

So I'll give you all a moment to do that.

Now let's review a few housekeeping guidelines.

This meeting is now being recorded and a recording of this session will be posted to the older workers COP.

We currently ask that you keep your microphones muted throughout today's meeting to ensure a seamless experience for everyone.

Should you have any questions please.

Classic Cauley 0:35

I had the most problem in the past.

I was able to get this VTA card.

The thing is, I can pay it.

Burnett, Lauren S - ETA CTR 0:42

Hi can you please mute? Thank you.

Tiffany Turner 0:43

Straight for the.

McNeace, Meche - ETA CTR 0:43

They're muted.

Burnett, Lauren S - ETA CTR 0:47

Should you have any questions, please type them in the chat and at the end of our session we will acknowledge them in the order of which they are received. Once again, thank you for joining our GPMS training and I will hand it over to Joyce.

Barcley, Joyce M - ETA CTR 1:01

Great. Thanks, Lauren.

So good afternoon, everyone.

Welcome to today's GPMS training.

Add case through add assignment.

My name is Joyce Barclay, and I'll be your guide today.

And Chanel Davis will be operating the life system.

So.

This training module will provide an understanding of the flow working from intake through assignment. We will walk through the intake eligibility approval, entering participant characteristics, adding an assignment, including adding a new organization as a host agency and how to edit and end an assignment. You will also see how to enter applicants on the waiting list and how to withdraw them from the program.

By the end of today's session, we hope users will be able to confidently create cases and assignments as the foundation for the case management in GPMS.

So now let's move into the live system and Chanel take it away.

OK.

Just a moment.

OK, so Chanel will be operating the system today and we will be walking you through how to add a case and how to add an assignment right from the start.

So we begin with at the beginning with the intake process from the SCSEP cases landing page by clicking add new case and that will open the participant search page.

The participant search uses the applicant's Social Security number to search for a match from the entire SCSEP database.

The search function ensures a duplicate case is not created.

Enter the applicant's Social Security number in both of these search data fields, and then click search.

So Chanel is entering those.

And then she'll click outside either of the boxes to show the search button.

OK, now as we can see, when a participant search result shows the individual is already in the system as Chanel's pointing to over there, it's already existing.

Their case status will be displayed. In this case, we see the participant is exited and closed. So before continuing, we need to research this participant to determine if they are eligible to be re enrolled.

So take down the participants PID so we can search in one of two ways to determine their eligibility for re enrollment.

You can use the participant search and the Admin Console or you can search using cases for the specific case file.

In this example, we're going to search from the cases page.

So we opened the cases page and we're going to use the filters, remembering we always click reset and then we're going to enter the PID.

And then click search.

And then we're gonna scroll down to see the results.

Cool. We see this participant is exited indeed. So we're going to click on the blue name hyperlink to open that case.

OK.

So on the in the participants case, which we see on the screen, we see that this participant is exited.

They were only in the program for a very short time, less than a month.

So there's really nothing we can see from here to prevent them from re enrolling. But since we're creating a new case, let's enter a Social Security number for a case that isn't in the system.

So we're going to return to the cases page to again add a new case.

OK.

So we're going to enter the Social Security numbers in both boxes again.

Have to be very careful entering those Social Security numbers because you can't see them.

And then we search.

And here we see that the system is advising us.

There are no results.

It does not exist .

So when the system advises there are no results in the prompts, it prompts you to complete the information so you can complete the case.

So we're going to enter the required information, which is the first and last name and date of birth.

And once that information is completed, we're going to just scroll down to and click continue.

Throughout the intake process, you're going to notice the top of each page has a blue case status bar that is displayed and it indicates where you are. In the case creation process the status is displayed include intake, eligibility characteristics and other characteristics. So, as we move through the intake, the status bar will update and help us keep track of where we are in the process.

So let's just scroll down this page and see what is on the case details page cause it does have 6 subsections, so as we scroll down I'll just read them off.

So we're going to be entering participant information.

We're not entering information in the pilot program enrollment.

There's the mailing address residence.

The secondary contact information and the participant demographics.

We'll walk through each of these sections and enter the information.

Just remember that when entering data any field marked by an asterisk is required and you must enter information there.

It's highly recommended though to enter all the data regardless of it being optional, and this way you'll have a full record and very easily accessible. But to keep within the training time frame today, we're not going to enter all the optional information for demonstration.

So we'll begin by entering the case details, and those include the grantee information.

So we select the grantee.

And the application date.

You can either use the calendar function or you can type it in yourself for the date.

Then we go up to the sub grantee.

And I think this one is Pima, yeah.

The Agency on Aging and the case will be assigned to Michi case manager.

Next we move on to the participant information, which includes basic contact information such as their phone and e-mail.

So while Chanel is entering their information, I'll just provide some comments that while the e-mail address is not a required field, it should be completed for all participants.

And if that if the person does not have an e-mail address, it's a good idea to create one for them and enter it here.

Using e-mail is extremely important these days for anyone seeking employment and learning to do so can become part of that person's employment plan.

Great.

Now we've got almost everything. Let's see. We got the employment status, the date of birth.

Now we want to do their technology access because that technology access information helps the case manager determine if the individual would be capable to participate in remote activities such as training meetings or remote training. And next we move to the sector-based training pilot program enrollment.

Now that's only for the handful of pilot grantees that already have the needed enrollment instructions. This section defaults to no and should not be changed until a participant enters the pilot program.

Moving down, we find the mailing address and the resident state. Today we'll be using Tucson, AZ as our city and state.

And Tucson's County is Pima.

The secondary contact information is also not a required field but is highly recommended to be entered.

There should be a contact on file in the event of an emergency or for when you are unable to directly contact the participant. If the applicant says they have no one to contact and if they happen to be engaged in another program, or if they're living in a

shelter you can use that program or shelter manager's contact as the emergency contact.

So we're not going to enter that here.

That was just to take a look.

Last is the individual's demographics.

Also, these are not required fields. However, if you have the information they should be entered.

So let's just quickly complete that.

It's a small amount of data to be entered.

And before we leave this page, we'll just look at the very bottom.

So there are three options to leaving a page and you will see these. These and other options on most pages before closing a page in in the system.

So to the far left, we start with clothes which will close that page without saving the information.

Then on the right side we have save and continue which saves the information you've already entered and continues to the next section or next page.

And then lastly, we have save and close to save the data for completion at a later time and closes the page. But since we're going to be moving through the entire process, we're going to be clicking save and continue which will open the confirm case creation window.

Again on confirmation boxes typically have two options, no and yes.

Clicking no closes the window and you remain on that page. In this case, the yes option creates a case and opens eligibility.

So we're going to click on yes.

Great.

So notice that blue bar.

That blue status bar at the top of the page.

It now shows that this applicant is in eligibility.

We're going to show you the process for both an eligible applicant and an ineligible applicant, but we're going to start with an applicant who is eligible.

We begin by entering the number in family and the preliminary eligibility date.

This date is the date the case manager determined the initial eligibility.

And then we're going to go back to the left and we're going to enter the total includable family income calculation time frame, and that can be either 12 months or six months now. Once that time frame is set, the data field for total includable family income opens and the system just know that the system does not annualize that six month income calculation.

So if you use the last six months of income for eligibility determination, make sure you

have multiplied that six month income by two and enter the total into the total income. So if you want to enter income in there.

So notice too that once the time frame was entered, the system automatically displays the maximum income threshold for the family of that size. There you go.

And when you enter the family income over to the right, notice that the system determines that the family is at or below 125% of the poverty level.

Confirming this applicant is eligible, it's very handy.

The last entry on this page is the applicant confirmation. While not a required field, the applicant must sign the certification that the information they provide is accurate and if you need more information about the applicant certification requirement, please refer to the data collection handbook which is available in Workforce GPS, older worker community of practice.

OK.

So we enter the date the certification was signed.

And the name of the person who witnessed that signature.

Great, now we click save and continue which will open the eligibility determination page.

Super.

So based on the information that we submitted, the system generated eligibility determination is displayed stating that this participant is SCSEP eligible and the reasons which are that they are unemployed, they meet the income eligibility threshold and they meet the age requirement.

The case manager is scrolling down, the case manager confirms the eligibility by clicking the check box, yes.

And before we submit this case, a little note about the eligibility approval process.

So the case manager's initial eligibility determination requires a supervisors final approval as a secondary part of the eligibility process.

So once this case is submitted, the supervisor receives a task to review and approve that eligibility.

So that's when the case manager is doing the submission, however when a case supervisor, a sub grantee administrator, or a grantee administrator enters the new case.

No further approval is needed, so just wanted to make that distinction.

OK.

Let's click submit eligibility, which opens the submit confirmation box.

Remember, our confirmation boxes have no and yes, so clicking yes to submit the confirmation will generate that task for the supervisor to approve the case and complete the eligibility process.

So go ahead and click yes.

And while we're waiting, the supervisor's approval for this case, we're going to complete the intake by entering the applicant's characteristics.

Again, we're just going to scroll down the page just to see what we're entering.

So we're going to start with the priority of service.

There you go then.

We have the most in need waiver factors.

Followed by other characteristics, and then other barriers to employment.

So it's quite a bit that we're going to be entering. So, scroll back to the top.

OK. We'll begin at the top of the priority of service.

It's very important to identify all of the applicants characteristics because many are connected to performance and the ability to grant a participant a durational limit extent.

When it's allowed by the grantees policies.

So let's complete the information.

And in doing so, we're going to just highlight a few things as we go along.

So the first highlight is going to be that many of the characteristics have a show, detailed instruction link, a blue link beneath these selection options you can unhide and hide those instructions by clicking the links on and off.

These links contain very helpful information providing additional information about that characteristic.

So it's very helpful if you have any questions, just click that link.

Case. So, on the veteran's status there has a special feature. If the applicant does not meet the veteran definition, you can click the center column no which auto populates the other two columns to no.

So it's just a little hint on getting through that more quickly.

For individuals with disability, clicking either no or participant did not self-identify in the first column will automatically gray out the last column about receiving services through SSDA.

Let's see for this this situation, we're going to click homeless as no.

And at risk as yes.

The urban or rural characteristic you just passed it.

The urban. There you go. The urban or rural characteristic will auto populate based on the address ZIP code entered when you were entering the intake.

So you don't need to worry about that next going down, we have failed to find unemployment after using WIOA. So, we can click that as no and let's say low literacy is yes.

You'll notice the characteristic low literacy skills and limited English proficiency are

mutually exclusive. When you check yes to one of the boxes, the other will automatically be checked, no. So for low literacy in this case we checked yes and we see that limited English proficiency is no.

Let's see the low employment prospects go back up next to low literacy.

Yep, we're going to check that as no.

And right beneath that, this is another one that has a connection.

The formerly incarcerated is we're going to click that no.

And this is in priority of services now, right below it. We have the most in need waiver factors and you notice that it automatically completed that as no as well.

OK. And that moves us down now into the most in need waiver factors?

Since these characteristics are updated annually, there is a date field for each factor, and we'll go through them and enter the information including the date. So, for the severe disability, we'll click no, and then we enter the date.

And we'll just go through.

Good idea. Little hint there.

What Chanel just did was she copied the date. Since all of these characteristics are updated on the same date and it's she just entered it in once, copied it and she can paste it into the date fields moving forward.

So for free, we're going to click no.

For 75 or older this is auto populated based on the date that was entered and intake formally incarcerated.

We saw already defaulted to no because it was no in the priority of services.

And now we'll move down to let's see, low literacy is right beneath 75 or older.

Up above, we clicked yes.

And we have to enter the date.

OK, severely limited employment prospects will be no.

Old enough to receive Social Security? No.

We don't have to click on anything under limited English proficiency because it already defaulted from the low literacy.

But we do have to enter the date.

Hey, next we move down to the other characteristics.

And we'll complete those going across.

Received TANF.

No SNAP, no.

Unemployment correct neither.

And no, there subsidized housing, let's say yes for subsidized housing.

And let's make the other two no.

Now this individual is low literacy.

Well, probably because they only completed the 11th grade.

So we put that information there, even though that's not a required field.

It's good to have that information and now we reached the last section, which is other barriers to employment.

We can collect both of those as no.

OK. Once completed we will save and continue. And don't worry if you happen to miss any of the factors on this page because the system will not let you continue if any are missed, and they'll stop and highlight. So, you can go back, and you can see.

which items were missed, which is very helpful.

You want to click save and continue.

Great. The next the last section we're going to be following the blue status bar at the top. You can see we went through intake eligibility characteristics and now we're in the last section called other enrollment information and this information.

This information captures the applicant's co-enrollment and other programs and the applicant's job interests and the dates for when the pre enrollment assessment and the general program overview were provided.

So going back to the top, oh, you're at the top, OK?

If the applicant is not enrolled in any of the listed programs, clicking none changes all responses to no. So, let's click none.

And let's scroll down.

Now the participant interest job code is not a required field.

However, it is strongly encouraged or suggested that you enter the job code.

In which the applicant has expressed for their employment interest. These codes are displayed in the participant reports and can be really helpful when seeking a participant who matches vacant community service assignments and you can select up to three job codes here.

And once Chanel finishes, she'll show them and you'll see that the three.

Yeah, there you go.

The three are displayed there, which is terrific.

The last section is the other care of. The other characteristics are the pre assessment and program overview dates and these were the dates that those activities were conducted.

So these are just general activities normally conducted when interviewing applicants prior to enrollment to determine if they'd be a good fit for the program.

So after all that information has been entered, we click complete.

And you'll see flashed at the top of the screen will be action completed.

And we return now to the cases page. So, while we're completing this intake information, the supervisor received the task to approve that applicant's eligibility.

So let's take a look at the supervisor. My tasks to see how that approval process is done.

You can see Chanel moved into the supervisor's my task. The blue case task box.

Is that big blue case task box?

I can't even say it.

Wow has all the tasks for participants that requires supervisor action, and from here the supervisor selects the participant needing final eligibility approval by clicking their name hyperlink to open the intake checklist.

So on the intake checklist, we see there's a list of action items and those are the and those are identified by green checkmarks when they've been completed.

So we have the eligibility, the characteristics, the other enrollment and then the program introduction check boxes.

To access the eligibility determination approval at the top of the page, we're going to click the approve eligibility button.

To access that approval page.

Great. The top of the eligibility determination approval page again displays the participant summaries on a lot of the pages through the intake process and the eligibility information that was entered by the case manager.

As we saw in the case manager entered the income information.

The system generated determination is displayed here as well, confirming that the participant is unemployed, that their income is below the poverty threshold and that they are eligible.

Beneath that system, determination is the case manager's request showing the applicant is eligible and the name of the person who submitted the approval request.

The supervisors eligibility determination is next and look very similar to what we saw the case manager complete for the initial eligibility determination.

If the supervisor agrees that this applicant is SCSEP eligible, they click yes.

OK. And then and date the eligibility determination?

Oops. First, they click the certification.

They click the certification saying that this person is eligible.

They enter the eligibility determination date and just to notice that the right after the eligibility determination date, the system does sign the name of the person who is approving the eligibility as the person who's doing this data entry and also does the timestamp. So now we click the eligibility.

Submit eligibility.

And we should see an action completed at the top.

Yep, we see action completed at the top and that returns us now to the eligibility checklist and you can see now that that eligibility box has been checked.

But what happens when the supervisor determines the applicant is not eligible?
Let's take a look at that to demonstrate that situation. We're going to return to the supervisor's my tasks to see they entered the data to see.

How they entered the data when they determined the applicant is not eligible.

So let's open another.

Eligibility determination case.

OK.

Which brings us back again to the eligibility checklist.

And from the checklist page, oops, go up to the top.

We click the approve eligibility button.

Let's say the supervisor determines this participant is not eligible.

Oh, there's the information.

Sorry, it lagged a little bit.

OK, so at the top, we have the participant summary followed by the eligibility information that was entered by the case manager.

We can see that it's a family of one and has \$15,000 as their income, so let's scroll down.

So let's say the supervisor determines this participant isn't eligible.

They've reviewed the file and they actually found some missing income that wasn't included in the calculation, and it's going to make this applicant over income.

So scrolling down, we now check the applicant is not.

Super. Not eligible by clicking, no.

Which opens two more boxes that need to be completed, or I should say two more sections that need to be completed. The 1st is the reason for the ineligible determination which is selected from that predetermined list. If the reason is something other than what is listed, then other.

Is checked and when you check other. Yep. OK great.

Another dialogue box opens then where you have to specify that other reason.

But in this case the reason is over income.

So let's just click income.

OK, the second section is the action taken again if other is clicked.

The other action needs to be specified, but in this case we're going to say we refer the applicant to the one stop.

Once the information is completed, the supervisor completes the authorization section where the supervisor is certifying the applicant is not eligible.

Last week we talked a little bit about those certification boxes and their meanings and you know, we talked about the certification. The staff is certifying different things every time you see that certification. So in this case, they're certifying that this person is not

eligible when the case manager did the initial they certified that they were eligible, so you always have to read those certification boxes.

The supervisor completes the eligibility determination date, which you've already done. And then as before, the system auto completes the supervisor's name and timestamps the entry.

Now we click submit eligibility, which returns the supervisor to their tasks.

Or in this case it didn't return us to the eligibility checklist page.

OK, now to continue from here.

So now we saw how.

The supervisor approves both and eligible and an ineligible file that was submitted to them. So now we want to go back and to the case manager screen to work with the applicants file to complete the enrollment process.

So from the cases page, let's locate the applicant's case.

We're going to show filters first.

We're gonna first, we're gonna reset.

Don't forget to reset and then we'll search.

And in this case, let's actually search on the eligible status.

Instead of entering the participant name.

Yeah. So just go there and click on eligible and all the participants who are eligible should appear in the table below.

And here you would click the name blue hyperlink that will direct us to their case.

OK.

So now it's displaying that applicant's intake checklist, and if we just scroll down there.

OK, we can see everything is completed except the program introduction and if we look at the top status bar, we see that the person has been deemed eligible and they're ready for an assignment.

So the intake checklist, let's go back to the intake checklist.

Just pay attention to that because it's your guide to ensure that all needed actions are completed before you add the assignment. If any items were still incomplete, like in this case program introduction, they would need to be completed before you can add the assignment.

So all of these.

Let's click on that program introduction blue hyperlink.

And there we have to enter the pre assessment date and the program overview date.

And let's click save and close.

You see the action complete.

Oh my.

Now it's showing us the other enrollment information is not completed.

Let's click on the other enrollment. When that happens, just go back and complete the information.

Click none at the top.

Maybe something didn't catch and scroll down?

The interest codes. OK, let's put in that same program information again.

And save and close.

Which should bring us back to the checklist.

Yay, OK.

Great. So all of these are now complete and let's begin adding the assignment by clicking on the assignment link up on the top.

We click on assignment.

OK.

So now at the very top of the page.

We see that we have the we have two buttons at the top of the page which are add assignment and add to wait list.

Down below it we have the status bar which shows that the applicant is eligible and we have the basic participant summary.

So let's begin adding the assignment by clicking that.

Add assignment button up at the top.

OK.

And we've already reviewed the participant summary. So, let's go down to the assignment details. Oops.

Hmm.

Scroll down.

Yeah, let's try that again.

It looked like one of the assignment checklists items didn't take.

OK.

Scroll down to the checklist.

OK.

Let's try that characteristics page again.

OK.

Just.

There you go. Let's Scroll down.

Make sure everything is complete.

Low employment prospects.

Nope. Go back up.

Go back up just above formerly incarcerated and they're right.

Yep, yes.

Click no.

Go over to the right.

I mean the left.

I mean, I'm sorry.

Go to the left.

Fail to find employment. Click no.

OK.

Scroll down to the next section please.

Whoops, sorry.

Oh, Nope, you're OK.

Keep going.

I'm just looking for all the asterisks.

OK.

Looks like everything is good on this page. Let's Scroll down.

Well, this is a good example of how you can just go back, and the system shows you where things are missing, and you can just go back and complete them.

So let's say TANF no.

SNAP yes or no.

Neither claimant. OK subsidized OK does not meet.

OK.

And we'll click no to both of those.

And then save and continue.

Great, the assignment opened so it knew we were trying to add an assignment, which was great.

And now it brought us to the add assignment page.

So like I said, we already looked at the participant summary information, so we'll just go to the assignment details.

So the assignment date is the enrollment date.

It is after that date when you can provide participants with paid activities. The assignment start date may not be the same date or it could be a future date, or it could be the same date, or it could be a future date. The participant may be assigned today. But start the assignment next week and for this purpose Chanel has entered the same date.

The assignment end date is not entered until that assignment is ended.

Remember though that the assignment end date must be entered before an exit can be added to this case.

The job code and workers comp code are not required fields.

However, you may need this information for workers comp purposes. So if you have the

information, it's advisable to enter it.

OK.

So let's move on now to the entering the host agency.

So searches, it always begins with a search and the searches have.

The searches will have one of two results when the organization is in the system as a host agency, the name will be in the search results and can be selected as we'll see in a minute when the organization is not in the system as a host agency A message will advise there's no agency and it will need to be entered. So, let's create one as Chanel's doing.

With beginning with a host agency that's already in the system, we'll go through both scenarios using an agency that already exists and then creating a new agency while we're adding the assignment.

OK. As you can see the agency ID, the name and their address and their contact up here and this is the organization we want to use.

So we click on the name of that organization and it turns that box nice blue, and we're going to select that organization.

OK, now you see the name of the organization appears.

OK. And now as we scroll down, we can see that let's see.

You know what? Let's go.

Yeah, let's go right underneath the a host agency under this site name and location.

So if that site name for the community service assignment, so this is Arizona, works if the site name and or location are different from the host agency headquarters name and location, enter the different name and the address here.

So people always ask, how do I know?

Where do I make the distinction? If it's the same organization, but it has a different location?

Well, the location is different for the community service assignment.

And there may be many different locations for an organization for their community service assignments, especially for instance, if you're working with the municipality that has offices throughout the city.

So this is where you would identify where that location that what it's called and where that location is.

So next we're going to enter the survey contact from the drop down list and this list contains all the contacts we added so that when we created the organization if the contact is not listed, we would click the. So let's say it's not listed.

We would click the new survey contact to add the new contact.

And we enter the required fields.

Though not required, it is really important that we include the e-mail address.

So because this is going to be the survey contact.

And since customer satisfaction surveys are now sent via e-mail, we need to have an accurate e-mail address entered in that field.

The cell phone number and then the e-mail.

Great. Once that's all completed, we click Save, which brings us back to the assignment.

And as you can see, the survey, the new person for the survey has been entered.

So for this case, we're going to say the supervisor is the same person is Miranda, and we're not going to enter another part another supervisor.

Now the next section is a little, not a little tricky, but there are two parts to this section are there are two options for the supervisor funding source type.

There's federal and nonfederal. Now both of these fields are optional.

So you do not have to complete these fields.

However, if you click nonfederal, two additional fields open and are required to be completed, and that's the supervisor wage per hour and the supervisor's number of hours per week.

So once that is once nonfederal is checked, that information needs to be completed.

So let's enter the supervisor's wage.

And the hours per week are not the supervisors working hours, it's the number.

It's the average number of hours of supervision that they're going to be providing to this participant. So, you would enter that number there.

Or it sounds great if you have the participant's schedule. It is optional, but it might be helpful to have that information easily accessible in the future.

But we're not going to enter it here.

We're going to go over now to the top of the next column.

And this is where we're going to be looking at the three options for assigned to.

This is a required field. Each of the options has specific requirements that are below, so we're going to go through each one of them separately. The 1st is the grantee or subgrantee local project, and that identifies when a participant is assigned to the grantee as participant staff.

You'll notice that the CSA code defaults to each one it automatically defaulted to east one and the CSA code type defaulted to elderly.

And that's because if it's part of the project, it's SCSEP and only serving seniors.

Now we Scroll down below.

We're not going to enter down here, but we'll just take a look.

You would also have to enter the participants starting community service wage per hour and also the planned number of hours per week, but we'll enter that in a few minutes.

Let's scroll back up to those three types, the sign 2's and let's see what happens with

the workforce partner.

Now the workforce partner could be like the one stop center.

So the one stop centers CSA code type would be general since the one stop serves the general population, there's CSA code you would select would be employment assistance.

And if it was something different, so the CSA code really is like the type of work the organization conducts while the code type itself is, whether it's general or just to the elderly.

And again, you would have to enter the wage per hour and the hours per week.

Now scroll up and look at the last one which is other host agency and that's basically any other type of assignment.

So the CSA code must be selected based on the nature of the organization's business. So, let's say it's general.

And the CSA code would be selected from the drop down. Let's just say social services. Yeah, we know this is.

And again now here you do not need to put the wage per hour or the if it's another host agency type, you don't have to put the wage per hour and you don't have to put the number of hours. But because this is the one stop we're going.

To go back up to the assigned to and say it's our workforce partner because it's the one stop we're going to put the code as general code type I should say and the code is going to be the employment Services employment assistance.

Now we do have to enter the wage per hour to complete this because that is a required field.

And the number of hours per week we could put in 20.

Great. So once all that information is completed, we click save.

And auto complete should be flashing at the top.

Super and that returns us to the assignment page.

And if you're following that blue status bar at the top, you see that this person is now a participant who is active before they were an applicant who is eligible.

Now they're a participant's active because they have been assigned to a community service assignment.

And as you can see down below in the assignments, there is now one assignment listed and below that it shows the details of the assignment.

Just above the assignment details, you will also notice that there is a row of links for assignment activities such as breaks approved, breaks training and services and paid hours.

These activities can also be accessed through buttons in the top right of the page you want to scroll up there.

You can see there is add assignment. There is add assignment service.

Add break and then click on that last box.

Yeah, click on that one and you see that's the paid hours.

So it's the same as those links that were down below and those and then also in related actions if you want to click over to related actions on the links.

You will see those same activities.

We can add an assignment.

We can add a break. We can manage paid hours and so forth.

So let's just go back up to the assignment page to the assignment link.

So we've seen how to create an assignment when there is a host agency already in the system.

Let's see how to add a host agency while adding a new assignment.

So before that, though, we have to end the first assignment that we entered.

So we'll Scroll down to the assignment details and we'll click on that edit button.

And scroll back to the blue section so everything that's in the blue is editable.

And we will end this assignment because he used today's date.

Use today's date again.

This is just for demonstration purposes.

And go down and well, yeah, maybe click tomorrow's date instead. I'm sorry.

Should let you just do what you thought was right because you were right and scroll down.

All the way down and we would click save.

And that's all there is to ending an assignment.

So if you scroll down to the table of assignments.

You see that the assignment there is the assignment start date up on top.

Go above it.

Into the table.

Cause, when you have more than one assignment, you're going to see them all listed on that assignments table. So, you have the assignment date, and you have the assignment end date and if you wanted to look at the details you would just look down below. So now we ended that assignment.

We're able to add a new assignment, so scroll back up to the top.

And we're going to click add assignment again.

Yeah, we're going to go this pretty go through this pretty quickly. So, if you want to just add the assignment and the start date here.

Great. And now we're going to look for the host agency by entering the state and city.

And again, this is we're going to go through just the details quickly, but this is going to be the new part and this is the new organization.

And now we're going to enter the name of the organization.

And we click search.

And we get a prompt that no organization agencies are available. OK.

So we're going to add a new host agency.

So we click add new host agency to do that.

We begin by entering the name of that new organization. Now just a note about the name.

Be sure it's the official company name and not the name of a program or a subsidiary, and the best way to determine the official company name is by referring to their federal employer identification number or their FEIN certificate. The FEIN is a number that's issued by the IRS to all businesses for tax purposes.

So every organization has an FEIN.

OK.

So now that we've entered the name, we're going to click add which will open the organization details for adding the new organization.

See, it says add at the top.

And now you'll see the organization name has already been entered from what you entered on the first page and now next to it, you're going to select the organization type, remembering that this is a host agency and it cannot be a for profit organization.

OK.

We scroll down and we're going to enter the address information.

For the required fields it's pretty nice that they all these fields are highlighted.

So you really can't miss them.

OK, after we enter the organization information, we're going to go back up to the top.

And we're going to look at the additional details section and this is a section where this organization is going to be linked to the grantee that's now creating it so you can see the organization function is already default is already marked as host agency and that's because we accessed it from the assignment page.

So now we have to indicate the organization's continued availability. And since we're hoping this is going to be a really active host agency, we're going to check that as available.

Now this is a host agency, but there's always a possibility.

But that host agency may also become a service provider or an employer at some time down the road.

So it's really helpful if you add those functions now so they don't have to be added in the future.

So while we're in here, let's just add all the functions we can to this organization by clicking add new.

And now we're going to select the value of employer because toast agency is already done.

Let's say that they're available as well.

One more add new and this time we're going to select service provider and we're going to say they're available great.

The additional details section is also where the dates of the host agency agreement and the host agency monitoring visits are entered.

So you can enter them there if you know what they are. If you have them, these dates are displayed on the assignment by host agency report, which will be covered in the report's training module when it's time to update the dates, simply overwrite.

These existing dates with the new dates, so we entered those dates and below.

See below that we're going to go into the job codes now.

In here you would just select the job codes for this host agency assignment, so any of the occupations for which they're going to provide training, you can enter here.

Great. Now we're going to enter the contact information for this organization.

OK.

So we're going to enter the, you know, let's start with the salutation.

It isn't a required field, but can't hurt, especially if they have a specific type of salutation.

You know, like Doctor or Pastor or something, it would be helpful for anybody contacting them in the future.

So we're going to enter their name and this is the person who's going to be receiving the customer satisfaction survey.

Now it automatically defaults to yes. This is the primary point of contact because this individual is not only receiving the host agency surveys, but they're most likely the administrative contact as well.

The point of contact not only gets the surveys, but they might get. They might be a supervisor for a specific assignment or a specific placement sometime in the future.

So that kind of covers all the bases.

Now we're going to enter their contact information.

And be sure to check the boxes by primary and alternate phone numbers for cell phones so you know it's a cell phone and you know you can use that to text the individual.

Also, the e-mail address is very important.

Since e-mail is often the primary communication method used by many organizations, and it's also the mechanism we use for sending the customer satisfaction surveys.

And the last section is going to be over to the right and it's the contact address.

Now there's the contact address doesn't normally get checked.

This is only if the person is located where you have already entered.

The address and the city and state above for the organization.

Can you scroll up a little bit, Chanel?

Just to show the address. OK right there.

So if the contact is located at that same address, you're complete, you're done.

But if, as we saw in the prior example, this contact is located at a different site and it has a different name, you would check the contact address boxes. The first box is if the address alone is different from the organization address and that's all you would complete.

However, if the name the location name is also different.

From the organization you would also click that box as well and you would enter the information below.

So let's enter the location name that's different from the organization name.

OK. And then we add that address.

And once all of that information is complete, we're going to scroll down and click add and that will return us to that assignment to complete the details and we'll do that really quickly.

OK.

So now we go. We look at that host agency, we look in the details and we see that before there was no host agency.

They didn't exist. You see, now that they do exist, we've already entered the site name, location information, and this particular community service assignment is going to be where this organization is listed as their address.

So let's go and click the survey contact.

Nope. Just above.

Just click the survey contact.

Scroll down and cancel.

OK, cool. Now just from the drop down, select the contact that you've already listed when you created this organization. If the supervisor is different, you would enter the supervisor information, but it's the same person, so you don't have to enter any information here.

We're going to say that this funding source is federal.

Just so we can go through quickly, we're going to say it's the other host other type of host agency.

For assigned to that it's general for the code type and it could be social services you could say social services or OK, great.

Now the CSA title isn't required, so we're going to click save.

Which will return us to the assignment page.

OK.

Now if we Scroll down now look at the assignment table.

Now you have two assignments.

It shows that one assignment was opened and closed and the second assignment is not closed, so it's active, it's open.

Now that we've added an assignment, let's talk about what would happen to the participant if the assignment wasn't immediately available right away.

So they became eligible.

And oops, the assignment isn't ready.

So what do we do?

Well, we can put them on the waitlist until they can be assigned and adding the wait list is done from the applicant's case.

Which we happen to be in.

Actually no.

We don't.

We had somebody because that applicant was already assigned and was a participant.

So now we need somebody who's eligible. And Chanel just brought us to a case of an eligible person who is not ready to the assignment is not ready for them to begin.

OK so from here we have the an eligible applicant and we're going to go to the related actions.

And we're going to select add to wait list.

Once we do that, the wait list confirmation page opens and displays the message, confirming that you would like to add this participant into the wait list.

We're going to Scroll down.

And we're going to, we're going to confirm the addition to the wait list by clicking yes.

And action complete will be flashing at the top.

And then we'll return to the related actions page.

Now let's go to that participant summary up on top.

Go to the summary and if we look at their status bar, it shows that they are on the wait list.

So now that we have someone on the wait list, let's take a look at how we would remove them from that wait list starting on the cases page.

So let's go back to cases.

OK.

So the 1st way we remove somebody from the wait list is by adding an assignment, because that would take them from being on the wait list to making them active.

The second is by withdrawing the participants case.

So we've already seen how to add the assignments, so now we'll demonstrate

withdrawing the case.

Just one note to remember that only applicants can be withdrawn before they are given an assignment.

That means no participants can be withdrawn only applicants.

That means the case must have a pre enrollment status of pending eligibility or wait list in order to be withdrawn.

So now we're going to use the filters.

Remember to reset.

And we're going to search.

We can either search by the participant's name, or we're going to or we can search by the status.

So let's search by the status and we're going to put in wait list.

And click search.

All the participants on the wait list will be displayed and we're going to click on the check box in front of the applicant to open that pages.

Action items, and from there we're going to select withdraw.

And click submit.

The withdraw case page opens and asks Are you sure you want to withdraw this case.

And we're sure.

So we click yes to withdraw the case.

And as with most pages, action completed flashes at the top and returns now to the cases page the applicant has been withdrawn.

You can also withdraw the applicant within their case.

So let's go back and filter again for folks.

On the wait list.

I'm glad I saw you hit that reset button. Yay.

OK.

So let's open that case by clicking on their blue hyperlink.

And now we're going to go into related actions and related actions will be covered more thoroughly during tomorrow's training.

OK, from the related actions we see we have several options and again, that's just based on the status of this not being an active case.

This is a case.

This is an applicant's case, so from here we can withdraw the case. We can manage their program introduction, we can edit their characteristics and we can edit other enrollment information as well.

But right now we want to withdraw the case.

So this is the other place from which we can withdraw the case.

So let's click on withdraw case.

And as we saw before.

The withdraw page opens and again asks to confirm that we want to withdraw this case.

So we're going to say yes, withdraw case and we'll see that action completed.

Flash at the top of the page and it returns us to the related actions.

So this applicant has been withdrawn.

See, there are no actions available, so the applicant has been withdrawn. OK, so.

We're now concluded with today's session.

Where we hope that you've learned a lot about adding a case, entering and approving eligibility, completing the entire intake by entering all of the applicant's characteristics.

We then reviewed, adding an assignment and how to add a new organization when one didn't already exist in the system we saw.

How to add and remove an applicant from the wait list? And finally, how to withdraw an applicant from the program.

So now it's time to open it up for questions and answers, and I'll turn it back to you.

Shanel do we have any notion?

I'm sorry we're going to turn it over to Michi.

McNeace, Meche - ETA CTR 1:07:51

That's me. Hello.

Barcley, Joyce M - ETA CTR 1:07:52

That's you.

McNeace, Meche - ETA CTR 1:07:55

Alright, we do have a few questions in the chat, so let's start with the first one.

It's they're asking. Robert is asking.

If income is entered that meets eligibility and then they are marked as ineligible due to income, will an edit flag be generated?

Barcley, Joyce M - ETA CTR 1:08:18

That's a really good question.

Let's go check.

Chanel, if you could go into your cases and find a pending case.

Pretty sure that's the status we would need reset, yeah.

No, not no. Just pending.

Not pending eligibility approval, yeah.

Hoping to find a case that doesn't have eligibility already entered so we can try.

We may not have a case in training that we can do this from.

But we do.

Would you open one of those please by clicking on the hyperlink?

OK.

Let's go to the eligibility link up above under summary at the top eligibility. Yep.

And.

Unfortunately, we can't enter that from here.

Let's try related actions.

See if there's an eligibility option there.

No, I don't see one there.

We can quickly try to create a case for you.

How much time do we have?

We have about 15 minutes.

Can we quickly create a case number?

Go back to your cases page.

And add a new case.

Put in your social.

OK, this will just take a minute to.

To enter the basic information.

Feeling the pressure there, Chanel.

Click continue.

Grantee you know who the grantee is and the sub and the case manager.

To center the employment status.

Go up one. Yep, there you go.

Go back up.

You forgot the technology accessibility.

OK mailing address.

See how she skipped over the pilot program enrollment.

That's because it defaults to no and we don't change it.

And the city and state and zip.

And you can just go to save.

The regs are optional.

Just, there you go.

OK.

So let's review Robert's question again.

McNeace, Meche - ETA CTR 1:11:58

The question is if income is entered that meets eligibility.
And then they are marked as ineligible due to income. Will the edit flag be generated?

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

OK.

So let's stick in.

Just put in your date.

It could be today's date. That's fine.

And put in your total.

Let's put 12 months.

And let's, oh, we lost you, Chanel.

McNeace, Meche - ETA CTR 1:12:34

Back.

Barcley, Joyce M - ETA CTR 1:12:34

She'll come back. Here we go.

McNeace, Meche - ETA CTR 1:12:36

There's an.

Barcley, Joyce M - ETA CTR 1:12:38

OK.

Let's make it OK.

That's fine.

They meet the eligibility cause. It shows the 125% is 19,000 and you've entered 17,000.

And we scroll down to the certification say yes.

And the applicant signed the certification.

And the witness? Super.

Go to the next page.

Click save.

OK.

This is the page, so we're going to say that this person is not eligible.

So to Scroll down seep eligible, no.

And scroll down. The reason it's income.

And we could have referred them to the one stop.

And scroll down.

And submit whoops.

Confirm.

OK.

So, because it seems to be that it did.

Davis, Chanel T - ETA CTR 1:13:48

Yes.

Barcley, Joyce M - ETA CTR 1:13:50

Sort of kind of.

So scroll up Chanel.

The system generation is saying that this person is eligible.

We are saying that the person is not eligible. Scroll down.

So now the comment field is required.

So while it lets you continue, it's making you put in a comment as to why you are saying this person is not eligible when the system says it is eligible. You just type test there in the comment.

And click submit eligibility.

Now, even though we're saying this person is not eligible, that eligibility is still going to the supervisor to approve.

So the supervisor can take a second look and make sure that the eligibility is appropriate.

How's that for an answer?

Do we have any more questions?

McNeace, Meche - ETA CTR 1:14:58

Yes, we do.

Barcley, Joyce M - ETA CTR 1:15:00

No.

McNeace, Meche - ETA CTR 1:15:01

If we have several.

So we're good with Robert.

Barcley, Joyce M - ETA CTR 1:15:04

We're good.

McNeace, Meche - ETA CTR 1:15:06

All right. The next one is from.

Medley how do we confirm which host agency is the headquarters location?

Can we find that information in GPMS or do we need to search it up ourselves?

Barcley, Joyce M - ETA CTR 1:15:25

OK. As we mentioned previously, the best way to find the headquarter information, the parent company information is from their federal employer identification number.

Their FEIN certificate, every business is issued that certificate by the IRS and it's kind of like a person's Social Security number. Everybody gets a Social Security number.

So you would get that you would look at that certificate and it would give you the name and the address, the official name and address.

Of that organization.

And the if you don't have it, you can always ask the organization for a copy of their FEIN certificate.

OK.

McNeace, Meche - ETA CTR 1:16:09

Alright.

Next, let's go.

Cindy is she wants to know.

Are we guessing this number?

So are we guessing when just assigning?

How will you know how many average hours the supervisor will be supervising?

Barcley, Joyce M - ETA CTR 1:16:32

That's a really good question.

Typically when somebody starts in a new assignment, you'll be having a conversation with that supervisor, and the supervisor can let you know how many hours they intend to provide for supervision.

And again it'll fluctuate.

You know a new participant in the program may need more hours of supervision than somebody that's been in that assignment for a longer period.

So go by whatever the supervisor tells you.

McNeace, Meche - ETA CTR 1:17:04

OK.

So the next one is basically about the same as the supervisor number of hours per

week. The amount of time they are working as a supervisor per week, or the amount of time they will be spending specifically supervising the client each week.

Barcley, Joyce M - ETA CTR 1:17:27

Another good question and your second part is correct.

It's the number of hours they will be supervising that specific participant per week.

McNeace, Meche - ETA CTR 1:17:31

Yes.

Right.

And then we're still on.

Supervisory hours are the number.

Barcley, Joyce M - ETA CTR 1:17:40

Whoo Hoo.

McNeace, Meche - ETA CTR 1:17:43

Of hours supervised equal to the number of training hours.

Barcley, Joyce M - ETA CTR 1:17:49

Maybe I doubt it, but I guess they could be.

Again, that's a conversation with the supervisor.

They would tell you how many hours they think they will be.

They will be supervising that individual.

McNeace, Meche - ETA CTR 1:18:03

Yes. And normally on a norm, we see that you know, supervisors don't typically supervise a participant.

Their total 20 hours per week, or four hours per day, right?

Barcley, Joyce M - ETA CTR 1:18:15

Hmm.

McNeace, Meche - ETA CTR 1:18:18

So it's just kind of that average amount there.

But Joyce is right. You know, having that discussion with the supervisor because some participant may require more supervision.

Where some may not require as much right, Joyce?

Barcley, Joyce M - ETA CTR 1:18:33

You got it.

McNeace, Meche - ETA CTR 1:18:34

All right, now the next one's from Cindy.

It's like doesn't the city spelling exact in order to search for the agency in the future?

So I guess they're saying, does the spelling of the city?

Needs to be exact when you do this the search and the reason why that they could little pokey at y'all because.

Tucson, AZ was Tucson was spelled.

TUCSON.

So, I mean, it was a good catch.

So if you misspell the city name, what does the system do?

Barcley, Joyce M - ETA CTR 1:19:10

Yeah. Good.

Yeah.

You know, I would suggest that we go look if we have time to look.

Because my guess is it will require.

The correct spelling.

So if we go into.

We go into.

I want to stay in the cases section.

I don't want to be in the admin console.

So let's go into.

The are we in a case?

McNeace, Meche - ETA CTR 1:19:46

You go into cases and do like add an education and training or something.

Barcley, Joyce M - ETA CTR 1:19:49

Yeah, let's go into. Let's go into an active case channel.

Just go into cases and just click any active case.

Cool.

And we're going to go into assignment up on top.

And we're going to at the very, very top where it says add assignment, we're going to add a service.

Let's scroll all the way down to the bottom.
Now put in because we did add that last that put in the state.
And misspelled Tucson.

McNeace, Meche - ETA CTR 1:20:42
TUSCON.

Barcley, Joyce M - ETA CTR 1:20:46
And then put in that organization you created.
Did you create Arizona or did you create?
You created a different one.
Yeah, there you go.
And it says no organization, no spell Tucson correctly.
Tucson.
And search.
OK.
Now we did create.
That is this.

McNeace, Meche - ETA CTR 1:21:32
Was it, Corey?
Corey.

Barcley, Joyce M - ETA CTR 1:21:34
Yeah.

McNeace, Meche - ETA CTR 1:21:35
Why don't you take out the last three letters in Corey?

Barcley, Joyce M - ETA CTR 1:21:40
Just make it no, leave Tucson.
That has to be the faux.

McNeace, Meche - ETA CTR 1:21:44
Leave it the hair and then.

Barcley, Joyce M - ETA CTR 1:21:47
Yeah. Now try search.

McNeace, Meche - ETA CTR 1:21:48

This.

Barcley, Joyce M - ETA CTR 1:21:49

Now try search case that was spelled differently.

Wow, how about just a C?

Just a C for the organization name.

OK.

I can't answer that question.

Wilkins, Patricia A - ETA CTR 1:22:06

Hey. Hey, Joyce. It's Pat. In the chat, they're saying that Tucson was spelled TUCSAN.

Barcley, Joyce M - ETA CTR 1:22:10

Yeah.

Ah, thank you, people in the chat.

Glad somebody was paying attention.

Tuscan.

Davis, Chanel T - ETA CTR 1:22:31

It was spelled completely wrong.

Barcley, Joyce M - ETA CTR 1:22:31

Scroll.

Scroll down.

Davis, Chanel T - ETA CTR 1:22:34

So this is how I put it in.

McNeace, Meche - ETA CTR 1:22:36

OK.

That makes sense because.

Barcley, Joyce M - ETA CTR 1:22:37

There's Cori.

So whoever was the person who caught that you win the prize.

McNeace, Meche - ETA CTR 1:22:44

Well, they do.

Barcley, Joyce M - ETA CTR 1:22:45

We will be contacting you later where we should send that.

McNeace, Meche - ETA CTR 1:22:48

But in the in-theory Joyce when she when she go to create an organization, the system doesn't know the correct spelling of a city.

Barcley, Joyce M - ETA CTR 1:22:57

Correct.

McNeace, Meche - ETA CTR 1:22:57

That could be a correct spelling of a city somewhere else in Arizona.

Barcley, Joyce M - ETA CTR 1:23:01

Yep.

McNeace, Meche - ETA CTR 1:23:01

So they're right.

I mean it's right.

Yes and no.

So yeah, you got to be conscientious about your spelling there.

Barcley, Joyce M - ETA CTR 1:23:08

Yeah.

McNeace, Meche - ETA CTR 1:23:09

So.

Barcley, Joyce M - ETA CTR 1:23:10

But that's a really good hint.

A really good tip.

McNeace, Meche - ETA CTR 1:23:12

Yeah.

So.

Barcley, Joyce M - ETA CTR 1:23:15

OK.

Next question.

McNeace, Meche - ETA CTR 1:23:18

Tuscan, there you go.

Barcley, Joyce M - ETA CTR 1:23:19

Toucan.

McNeace, Meche - ETA CTR 1:23:23

So someone said that if you know they're thinking, it's going to make it hard to do a search for organization. If you're saying, OK, Tucson's spelt this way.

But it's not toucan.

Barcley, Joyce M - ETA CTR 1:23:33

Hmm.

McNeace, Meche - ETA CTR 1:23:35

Alrighty.

Lindy says.

Please say again at the end how to get the training as a retraining.

I have trouble signing in every time and miss a lot.

So Cindy, if you missed any of our training that's already been delivered.

The recording and the transcript will be posted on the older worker cop, so you can go back through the cop and then pull down the recording.

And go and watch it from there.

All right. The next one is.

If the same host agency offers more than one category of training for the assignment, can multiple job codes be selected?

Barcley, Joyce M - ETA CTR 1:24:31

I believe up to three job codes can be selected.

And Chanel if you just want to go into scroll back up.

And let's go. Yeah.

McNeace, Meche - ETA CTR 1:24:43

I remember you said that.

Barcley, Joyce M - ETA CTR 1:24:50

Now is this the? Is this the job code or is the job code for the host agency?
Which job code where they were referring to for the assignment.

McNeace, Meche - ETA CTR 1:25:00

They're saying if they offer, let me go. If the host agency offers more than one category of training.

Barcley, Joyce M - ETA CTR 1:25:04

Post agency.

OK, that would be.

We would have to go into the organization.

McNeace, Meche - ETA CTR 1:25:10

So.

Barcley, Joyce M - ETA CTR 1:25:13

And.

We could do it from.

McNeace, Meche - ETA CTR 1:25:16

So under that job, code for which training is provided, you can only select one.

Barcley, Joyce M - ETA CTR 1:25:23

Yes, right here.

But that's what the assignment job code is.

It's not the host agency job code, and the host agency job code is attached to the host agency organization.

So when we were entering the new organization and I'm just going remembering now as we're entering the new organization and we were entering the job code, you can enter up to three job codes. So, you can select more than one, you can select three.

McNeace, Meche - ETA CTR 1:25:56

For the organization.

Barcley, Joyce M - ETA CTR 1:25:57

For the for the organization, yes.

McNeace, Meche - ETA CTR 1:25:59

But only one. If you're doing an assignment for a participant here.

Barcley, Joyce M - ETA CTR 1:26:05

Correct, because it's only one assignment, you can only one job code.

McNeace, Meche - ETA CTR 1:26:06

OK.

OK. Gotcha.

Let me go back up.

I hope that answers the question and there was questions about actual numbers of hours and direct supervision, you know versus community service hours which we covered.

Barcley, Joyce M - ETA CTR 1:26:28

Yeah.

McNeace, Meche - ETA CTR 1:26:28

And here's one Carla's asking if the host agency uses a PO box for mailing address.

Do we want to add the physical address initially, then add the PO Box as a contact address or just add the PO Box as the address?

What would be the best practice, Joyce?

Barcley, Joyce M - ETA CTR 1:26:48

Actually, when you are entering the host agency or you're entering the organization information, there are two lines for the address.

You can put the organization's physical address, and you can put their PO Box.

I would ask them where do they want to get their mail. If they want to get their mail at the PO Box, I would put that first.

If they say no, just send everything to our physical address and I would make that one first.

McNeace, Meche - ETA CTR 1:27:23

Huh.

The next question is, when is the report's training? Will an e-mail go out to interested people?

And yes, and meeting invite for that training did go out this week, and that training is scheduled for May 28th Wednesday.

May 28th.

Barcley, Joyce M - ETA CTR 1:27:49

That's in place of office hours, correct?

McNeace, Meche - ETA CTR 1:27:51

Yes.

And the next one is.

It was Linda Myers that said that Linda, if you didn't receive that meeting, invite, if it wasn't forwarded to you. If you want to put your e-mail address in the chat, we'll forward the meeting invite to you.

All right.

From Cheryl.

She's asking when someone is on the wait list.

Is there a time limit before we begin getting reminders on the task list?

Barcley, Joyce M - ETA CTR 1:28:24

I do not have an answer for that.

McNeace, Meche - ETA CTR 1:28:26

We don't believe so.

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

Mm hmm.

McNeace, Meche - ETA CTR 1:28:30

OK.

I mean, you don't want to keep a person on a wait list forever.

For years and months, right?

Barcley, Joyce M - ETA CTR 1:28:42

Yeah.

McNeace, Meche - ETA CTR 1:28:45

Alright, so next question is, is there a particular reason why low literacy and limited English proficiency are mutually exclusive?
What if we get a participant who has both?

Barcley, Joyce M - ETA CTR 1:29:01

That's an excellent question and I was waiting for that question.
In the regulations, Michi, you answer this one.
It's statutory or regulatory.
It's one of those.

McNeace, Meche - ETA CTR 1:29:12

Well, it's not regulatory language per se, but I mean cause, it's listed as one of the you know the most in need factors or you know things of that nature, however.

Barcley, Joyce M - ETA CTR 1:29:16

OK.

McNeace, Meche - ETA CTR 1:29:26

The system doesn't. Even if you look at the data collection handbook, it doesn't specifically say that the reason why.

Barcley, Joyce M - ETA CTR 1:29:35

Right.

McNeace, Meche - ETA CTR 1:29:36

It does the data collection handbook specifically just says that the GPMS system will not allow you to select.

Both.

And I don't want to misspeak here, but there is a reason there is a reason for this and I just want to make sure that I get that right.

So before I speak on that, let me find where I found that explanation.

And then what we'll do is we will share it with you guys. Hopefully if you come to our next training, we'll have the answer and then we will share that information with you because I don't want to misspeak right up today.

Barcley, Joyce M - ETA CTR 1:30:11

Yeah, yeah.

McNeace, Meche - ETA CTR 1:30:16

Alrighty.

But it does not allow you to take credit for both.

All right. So, the next one is.

When you are at the point of entering the other enrollment and the program introduction in the intake checklist, is there a way to avoid having to do that section again because it always cancels out?

Barcley, Joyce M - ETA CTR 1:30:44

To be perfectly honest, this was the first time I've experienced that was during today's demonstration.

I've never had a problem with that in the past, so I have no answer for you.

But if it continues to do so, like if this happens to you all the time, you may want to submit a Zendesk ticket and just make them aware of it.

McNeace, Meche - ETA CTR 1:31:07

I agree.

OK. The next question is what happens in the case if a supervisor rejects the eligibility?

Barcley, Joyce M - ETA CTR 1:31:19

What we saw were the supervisor did determine the person as being ineligible.

And so what happens?

A person's ineligible and they're referred.

In this case, they were referred to the one stop.

They cannot continue the enrollment process.

McNeace, Meche - ETA CTR 1:31:39

I think they're more or less looking, so if case manager says participant is eligible, blah blah blah.

So supervisor gets it and the supervisor sees, oh, the income was incorrect, so it made them ineligible, right?

So they marked them as ineligible.

So the next step would be would it?

Would it go back to the case manager saying the supervisor?

Found that the eligibility was incorrect, so the participant is not eligible by income for this scenario.

And then that's the point in time where the case manager would have to do what you

just said, inform the participant.

Unfortunately, they're ineligible due to income. And then you said refer to the one stop.
Correct Joyce.

Barcley, Joyce M - ETA CTR 1:32:25

I believe there is a task or notification that goes back to the case manager.

I know there's one that goes back that says that something. I don't remember the exact wording about it being approved, so I would think that there would be 1 similarly, but that's another one we can check and get back to you.

McNeace, Meche - ETA CTR 1:32:31

Mm hmm.

OK.

All right. So, Helene, put in use a ZIP codes. Question marks.

But I wasn't.

I'm not sure what she's referring to.

So, Helen, if you can either add in some additional information in the chat, we can come back to it.

And the next question is from Isabel, host agency question. Can you correct or update the address of an existing host agency?

Barcley, Joyce M - ETA CTR 1:33:18

You can't.

But Zendesk can.

So if you have any changes to the name or the address, submit a ticket and they'll take care of it.

McNeace, Meche - ETA CTR 1:33:28

OK.

So they're still joking on you, too. About Tucson, Tucson and Tuscany.

Now we're going. We've got to Tuscany.

Oh.

And then there was another question.

Does it require you to put in the city?

I'm assuming when you're doing the organization does it require?

Is it the city a requirement?

Barcley, Joyce M - ETA CTR 1:33:55

Yep.

McNeace, Meche - ETA CTR 1:33:56

Yes, OK.

Announced, so Rita's asking is there a report that shows all the host sites?

Barcley, Joyce M - ETA CTR 1:34:06

Yes.

There you go. Yes.

There is in the in the report section for assignment by host agency. There are two.

I'm thinking there are two checkmarks, 1 to just show active and one to show.

I think it says one to show all or I forgot what it's called but.

McNeace, Meche - ETA CTR 1:34:27

But that would be the only report for host agencies.

Barcley, Joyce M - ETA CTR 1:34:28

That's the only report.

There's the one.

Only one report for host agencies, yeah.

McNeace, Meche - ETA CTR 1:34:38

Alright.

OK.

So Laverne, we'll put another link in the chat for the cop.

We'll do that.

So why?

Here's one why does the GPMS not allow corrections once an entry has been stayed?

For example, if a participant name was entered incorrectly, in other words, how do we how do we correct the mistake made after data has been saved?

Barcley, Joyce M - ETA CTR 1:35:16

Simply submit a Zendesk ticket and let them know what the incorrect spelling is, and the correct spelling should be.

And give them the PID. So, to make sure they pick up the right participants, you put the

PID incorrect, correct?
Ask them to correct it for you.

McNeace, Meche - ETA CTR 1:35:35

Cindy responded.
She says Zendesk.
She's absolutely right.

Barcley, Joyce M - ETA CTR 1:35:41

I love that name.
I just know there's something about the name I just like.

McNeace, Meche - ETA CTR 1:35:47

Alrighty.
Eric is asking.
May I ask for my task under case tasks list the recertification due date by 30 days early for example it listed due date for the recertification due date as 5/1/25.
However, the participant was enrolled on 6/1/24.
Should due date.
6/1/25.
So I what they're saying is in my task, if the participant was enrolled on June 1st, 2024 and in my test the recertification due date is saying 5/1/25, 11 months later.
Is what they're saying.

Barcley, Joyce M - ETA CTR 1:36:38

To me that makes sense because if it's in my tasks, you want enough notification so that it doesn't become past due.
And when you do, don't forget a recertification has to be done within a 12 month period. It doesn't say you have to wait 12 months, so to me it makes sense that it would give you the 11th month warning.
So, you have a month to get it done and this way as it escalates through the my tasks. You know, it's goes to show. Chanel, could you click on my tasks please?

McNeace, Meche - ETA CTR 1:37:12

So basically, it's basically you're saying is that in my task it's going to show, but it's going to be one of those upcoming the upcoming, yeah.

Barcley, Joyce M - ETA CTR 1:37:18

Yeah. Yeah. So. So then you'll have it.

Then it'll come up with due soon and then past due.

So I it would make sense to me that it would be a month in advance so you can get it done and it doesn't become past due.

McNeace, Meche - ETA CTR 1:37:39

Cool beans, Eric.

I hope that answers your question.

All right, now here the response was suggesting a solution on finding the company with the missed. OK, there the misspelled name and oh, the zip code. They said the ZIP code was the reason. Helene, put the ZIP code. She said it was suggesting a solution to finding the company with the misspelled city name.

That perhaps the ZIP code.

Barcley, Joyce M - ETA CTR 1:38:12

I don't think there's a search function on ZIP code. I think it's only on state and city and then the name.

McNeace, Meche - ETA CTR 1:38:20

Yeah, they give you 3 options.

Barcley, Joyce M - ETA CTR 1:38:21

So.

Yeah, well, it's not three options.

Three required fields. The ZIP code isn't one of them, yeah.

McNeace, Meche - ETA CTR 1:38:26

Maybe.

Alright.

And Cheryl wants to know, does do they need to send in the Zendesk ticket if the host site information is incorrect too?

Like the name or the address.

Barcley, Joyce M - ETA CTR 1:38:48

You do have to send in a ticket, yes, for name and address.

McNeace, Meche - ETA CTR 1:38:56

So there there's a statement here that sometimes they come across one organization

that was entered into GPMS multiple times with different contact names and addresses.

Will I submit a Zendesk ticket?

Barcley, Joyce M - ETA CTR 1:39:15

You can.

I'm not sure if there's anything that can be done.

I'm not sure if there's anything that can be done in that instance, but you can definitely submit a Zendesk ticket and see what they recommend.

McNeace, Meche - ETA CTR 1:39:30

There's a question for Rita.

How can you pull a host agency report which are which are inactive?

The current report is for active host sites.

Barcley, Joyce M - ETA CTR 1:39:46

Chanel, can you click on the reports in the navigation tab next to my tasks?

Click on the grantee.

Let's pick a grantee.

OK. And enter sub grantee.

And search OK.

Scroll down and just above the purple employers assignment by host agency.

Click the refresh until it opens.

Just click it a couple times, there we go.

Just up at the top and the filters it says display active host agencies display active assignments.

Yes, you're right there.

All you have is those two options, so they would only show active.

It wouldn't show old ones.

McNeace, Meche - ETA CTR 1:40:38

Yep. And we don't have a host agency extract report as of now.

Barcley, Joyce M - ETA CTR 1:40:43

No.

McNeace, Meche - ETA CTR 1:41:00

So here is a suggestion and if you unclicked display active host agency and don't pick

any up from the filter.

And do search.

Barcley, Joyce M - ETA CTR 1:41:12

Go ahead, see what happens.

It's shown there's only three host agencies that are active.

Looks like it's the same information.

McNeace, Meche - ETA CTR 1:41:27

Well, that's because that's all you have in the system.

Barcley, Joyce M - ETA CTR 1:41:28

As the yeah. Yeah, that's true. Yeah. And they're probably all active.

McNeace, Meche - ETA CTR 1:41:34

So that is.

Barcley, Joyce M - ETA CTR 1:41:34

Cause, don't forget we're in the training site.

So yeah, we have limited data.

McNeace, Meche - ETA CTR 1:41:39

That is a great suggestion.

Try doing that, Rita.

Alrighty.

I think for the chat we may have covered all of the questions, and I know that there was.

I know that earlier Joie had her hand up.

I don't know if Joie's still with us or her.

Her hand got tired.

But Patricia Green has her hand up.

Patricia, you want to go ahead and unmute yourself?

Patricia Greene 1:42:17

Yeah. On regards to the host agencies, the only way I found a lot of good information to even look back at who we might be able to work with. Again, I went into the PA assignments by host agency report.

And in the regular reports and then I just put the dates, and I think I put 2006 and went on and gave me a whole bunch.

Barcley, Joyce M - ETA CTR 1:42:41

Hello.

Patricia Greene 1:42:42

I got a whole spreadsheet of like.

I know I'm not sounding very professional.

Right now.

But that's eight.

McNeace, Meche - ETA CTR 1:42:50

No.

Barcley, Joyce M - ETA CTR 1:42:51

It's good information. Oh, thank you.

Patricia Greene 1:42:53

I got 807 results. So, for BA we got 807 different training sites that either are in use or were in use that were kind of filtering through. Now to see where we need to go.

Barcley, Joyce M - ETA CTR 1:42:55

Wow.

Patricia Greene 1:43:07

Actually, no. I have more than that.

I have 8611 so yeah so.

Barcley, Joyce M - ETA CTR 1:43:12

Wow.

Patricia Greene 1:43:15

PA assignments by host agencies so.

So the host the assignments by host agency report is where you'll find all that by the dates.

Barcley, Joyce M - ETA CTR 1:43:26

Thank you for that.

That's really good information.

Patricia Greene 1:43:29

No problem.

McNeace, Meche - ETA CTR 1:43:30

And Rita's also saying that the only way is to look at old host sites is under manage organization and put in each.

ABC search 26 times.

Barcley, Joyce M - ETA CTR 1:43:43

Wow.

Patricia Greene 1:43:44

Yeah.

That's how I started.

That's how I ended up at the assignments by host aging forever ago.

McNeace, Meche - ETA CTR 1:43:54

26 times.

Barcley, Joyce M - ETA CTR 1:43:56

Wow.

McNeace, Meche - ETA CTR 1:44:00

So the suggestion that if you go into the assignment by host agency report right and you don't click on either of the active or host agency or assignment. And of course you can also put in the date, but you just do search that you will come up with.

The organization summary. It will show you all your host agency and it'll show active number of active participants, number of inactive participants.

But it doesn't really tell you whether or not that post agency is inactive.

But it does.

It just tells you how many inactive, inactive participants.

But it does tell you, out of all of them, the number in the report summary.

It tells you the number of host agencies and let's just say 110, but it'll also show you the number of active host agency like say 50.

Barcley, Joyce M - ETA CTR 1:44:51

Mm hmm.

McNeace, Meche - ETA CTR 1:44:57

So that means fifty of them are inactive.

But who those inactive ones are?

I think you would have to go in there and do what Rita says and search for them 50 times. In lieu of 26 times.

But now we're going to be curious and, you know, to put in, if you put in a date that was suggested going back like, say, a few years back, right?

Barcley, Joyce M - ETA CTR 1:45:18

Yeah.

Yep.

McNeace, Meche - ETA CTR 1:45:23

And search and don't put any other filters in.

Barcley, Joyce M - ETA CTR 1:45:28

You know, we're going to look for that when we do the reports module.

McNeace, Meche - ETA CTR 1:45:33

Oh, I know.

Barcley, Joyce M - ETA CTR 1:45:34

Yeah.

McNeace, Meche - ETA CTR 1:45:35

It still it will give me, you know if I went, I went back to let's just say.

2020.

And searched.

It'll show me like a number of host agencies and the number of active host agencies.

It still shows the number, but it just doesn't tell us who those inactive post agencies are.

But.

Now you've got our curiosity going, so I need to stop cause. I keep going and I'm. I'm lost focus here so.

Barcley, Joyce M - ETA CTR 1:46:13

I know going down that rabbit hole.

McNeace, Meche - ETA CTR 1:46:17

We yes, yes, yes, yes, yes.

I'm going down that rabbit hole, Rita.

I'm trying to avoid you from doing it 26 times.

All right, so I don't see any more questions in the chat. Joie said she took her hand down.

And if you don't have any other questions, Joie.

I mean, we're here if you have a question.

If not, I don't see any more hands that are up.

And right now we're at 352, just a little slightly over, which was good though.

Barcley, Joyce M - ETA CTR 1:46:52

Over. Yeah, a lot of good questions.

McNeace, Meche - ETA CTR 1:46:55

Yes, all right.

Well, I think that so far that's it, Joyce. Yay.

Barcley, Joyce M - ETA CTR 1:47:02

Well, before we wrap, we wrap this session.

I would like to offer a round of applause for Chanel for her excellent job navigating.

Thank you, Chanel.

Davis, Chanel T - ETA CTR 1:47:14

Yeah, no problem.

McNeace, Meche - ETA CTR 1:47:18

And I would like to say great job, Joyce Chanel, you covered a lot of content, a lot of content.

And so our next training is tomorrow.

Same time same bat channel of course, and that is going to cover.

McNeace, Meche - ETA CTR 1:47:35

Is going to cover what we call.

McNeace, Meche - ETA CTR 1:47:41

Kat Wilkins on our team is the one who named this case level links when we first started

doing training. So, we're going to be covering case level links in the system.

McNeace, Meche - ETA CTR 1:47:55

Participant required actions.

And related actions.

So some of it we, you know, we'll just kind of skim through it because a majority of it, Joyce has gone through today and we've covered a lot of them throughout our admin console.

Presentation as well too, but we look forward to seeing you all tomorrow at 2:00 PM Eastern Time and until then you all have a very wonderful evening.

Thank you for joining us today.

And we will say adios for today.

Ernest Ekpoh 1:48:34

Thank you.

McNeace, Meche - ETA CTR 1:48:35

Thank you.

Joy Luangphaxay 1:48:38

Thank you.

McNeace, Meche - ETA CTR 1:48:40

Thank you.

And you're welcome.

Barcley, Joyce M - ETA CTR 1:48:44

Everyone have a great evening.

McNeace, Meche - ETA CTR 1:48:55

Great stuff, Joyce.

Barcley, Joyce M - ETA CTR 1:48:59

A lot of good.

Shall we end the recording?

McNeace, Meche - ETA CTR 1:49:02

Yes, I'm going to do that now.

McNeace, Meche - ETA CTR stopped transcription