

TrackOne New Features Release – January 2007

Side-by-Side Comparison of the Before & After

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Overall Application and Enrollment Process

OLD APPROACH

Application and Enrollment Process

STEPS:

1. “Add New Client,”
2. “Add New Application,”
3. “Create Registration,” and
4. Add 1st Intensive Service.

MODEL: The user defined and created the application and enrollment process. The “Applications and Enrollment” screen displayed all enrollments (or ***periods of participations*** {***POPs***) and the system would allow additional applications/registrations to be created. This allowed duplicate applications to be created and a new enrollment to be created even if there was an open/active enrollment.

NEW APPROACH

Application and Enrollment Process

STEPS:

1. “Add New Client,”
2. Add/Record a Core Service,
3. Create Application,
4. Edit Registration
5. Add 1st Intensive Service.

MODEL: TrackOne defines the ***Period of Participation*** (***POP***) based on services and then drives the application and registration process. A core service is required to start the period of participation. Once this is established then an application and registration can be attached to this POP

Add New Client

OLD APPROACH

Add New Client

Laid off from TAA Certified Position/Employer:
This field was a simple check box.

Laid off from TAA Certified Position/Employer:

Hispanic/Latino:


This field was a simple check box.

Hispanic/Latino:

NEW APPROACH

Add New Client

Laid off from TAA Certified Position/Employer:
Now the field has a “look-up” magnifying glass which allows the user to find and select the specific TAA certified employer.

Laid off from TAA Certified Employer: 

Location: Fremont
TAA Petition #: 59447

TAA Certified Employer - Lookup

TAA Certified Employer - Lookup

Cancel

74 records found.

TAA Petition	Company	Location	CertDate	BeginDate	EndDate	ATAA	Region
60304	Gemtron	Vincennes	11/28/2006	10/20/2005	11/28/2008	Y	11
60297	Craft Tool & Mold, Inc.	South Bend	11/17/2006	10/24/2005	11/17/2008	Y	2
60394	Airtomic	Jeffersonville	11/15/2006	10/19/2005	11/15/2008	Y	10
60244	Mosey Mfg. Co.	Richmond	10/27/2006	10/12/2005	10/27/2007	N	6
60157	Visteon Systems/Climate Control Div.	Connersville	10/19/2006	9/22/2005	10/19/2007	Y	6
60069	Cooper Standard Automotive	Auburn	10/6/2006	9/8/2005	10/6/2008	Y	3

Hispanic/Latino:

A pick list is present.

Hispanic/Latino:

- Yes
- No
- Did Not Identify

Add/Record Core Service

Service Search Screen

OLD APPROACH

Add/Record Core Service

Model: TrackOne **did not** require a core service before an application was created. However, it has always been part of DWD tiered services policy.

Service Search Screen

The service search screen **does not** limit/filter the available services based on the client's location in the service delivery model or on eligibility criteria.

Descriptive text at the top of the service search screen is different.

ClientTrack.NET Search - Microsoft Internet Explorer

Available Services/Activities

Click on the **Search** button to see a list of all activities, services, and training programs available to the client through the Work One system and other approved service providers. To filter the list, you can select a general **Category** (Case Management, Training Programs, Support, etc.), and/or a specific **Service Type** (Line Code). You can also type in a full or partial **Provider Name** and/or **Service Title** to match in the listing.

After you have located the desired service in the list, click on it to select it and return to the WIA Activity screen.

Category: WIA Case Management

Service Type: -- SELECT --

Provider Name: WIA Core

Service/Program Title: WIA Case Management

WIA Training
WIA Youth
Partner Services
Wagner-Peyser Services
TAA Services

Search Cancel

TrackOne returns (and allows) all services to be recorded for the client.

NEW APPROACH

Add/Record Core service

Model: TrackOne now mirrors the DWD tiered services policy. A core service **is required**, before TrackOne will allow you to create an application.

Service Search Screen

The service search screen **does** limit/filter the available services based on the client's location in the service delivery model or on eligibility criteria.

Descriptive text at the top of the service search screen is different.

Available Services/Activities

Click on the **Search** button to see a list of activities, services, and training programs available through the Work One system, for which this client has been determined eligible.

To filter the list, you can select a general **Category** (Case Management, Training Programs, Support, etc.), and/or a specific **Service Type** (Line Code). You can also type in a full or partial **Provider Name** and/or **Service Title** to match in the listing. After you have located the desired service in the list, click on it to select it and return to the WIA Activity screen.

Category: WIA Case Management

Service Type: -- SELECT --

Provider Name: -- SELECT --

Service/Program Title:

Search Cancel

Provider Name	Service/Program Title	Service Type	Line Code
No results found.			

Since this client does not have an open period of participation (or an application for an open enrollment, then the service search screen returns "No results found" for a search for an intensive service. The only available services at this time are Core services.

Funding Stream & Program Enrollment

OLD APPROACH

Add/Record Core Service

Funding Stream

Funding stream *is not* filtered based on the individual's eligibility or location in the service delivery process.

Funding Stream:*

Indiana WorkOne System

-- SELECT --

-- SELECT --

RRS-6-04 Rapid Resp. Region 4

RRS-6-07 Rapid Resp. Region 7

RRS-6-10 Rapid Resp. Region 10

NEG - AIR2

NEG - STL2

WIA-Adult

WIA-Dislocated Worker

All possible funding streams for the service are present. Also the old approach did not have a general "WIA Core" funding stream.

Program Enrollment

User required to identify and link the appropriate open period of participation to the service.

Program Enrollment:*

-- SELECT --

-- SELECT --

-- SELECT --

12/31/2006 - WIA/W-P

NEW APPROACH

Add/Record Core service

Funding Stream

Funding stream *is* filtered based on the individual's eligibility or location in the service delivery process.

Funding Stream:*

Indiana WorkOne System

-- SELECT --

-- SELECT --

WIA Core Services

The available funding streams are based on the individual's eligibility. There is now a general "WIA Core" funding stream available.

Program Enrollment

The Program Enrollment field is no longer a user defined field. TrackOne automatically attaches the open/active program enrollment (period of participation) to the service.

Line Code: CS

Service Type: Informational/Self-Service

Provider: Indiana WorkOne System

Funding Stream:* WIA Core Services

Training Provider ID:

O*Net Code:

Application and Enrollment

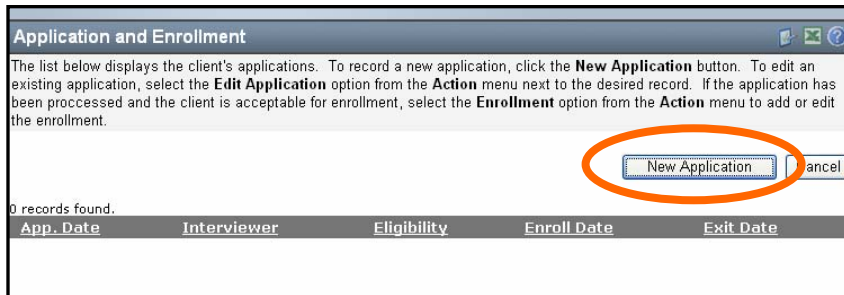
Create Application

OLD APPROACH

Application and Enrollment

New Application

The “New Application” button was always available on the Application and Enrollment screen.



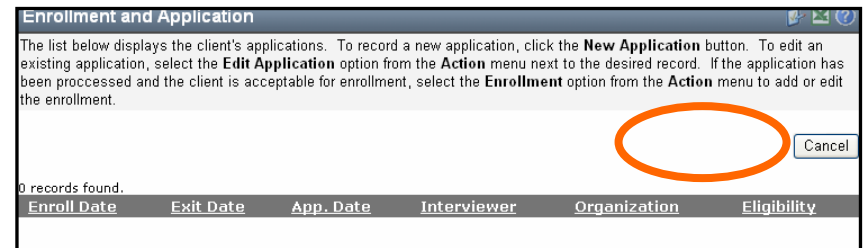
The “old” approach allowed more than one application to be associated with an open enrollment.

NEW APPROACH

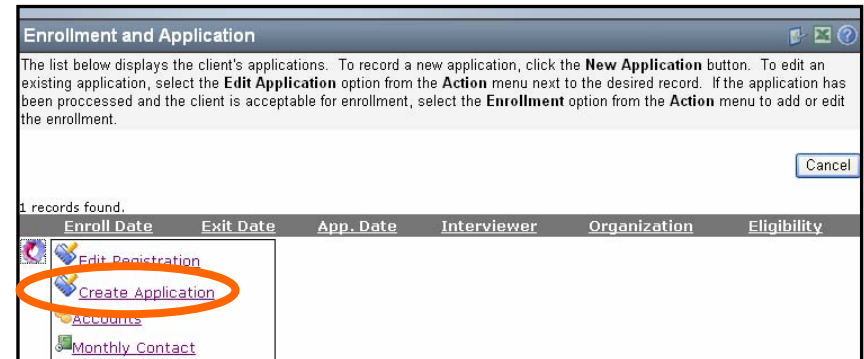
Application and Enrollment

Create Application

The “New Application” button has been removed.



The screen shot above is for a client without a core service which creates a period of participation. The screenshot below is for a client with a core service. The “New Application” button is not present, but the Action icon on the period of participation record has “Create Application.”



Only 1 open application/enrollment will be allowed moving forward. This will prevent staff from mistakenly creating a second application during an active period of participation.

Application

Eligibility Determination Changes

OLD APPROACH

Application – Eligibility Determination Changes Youth 5% Provision

The “Qualifies Under Youth 5% Provision” was a user entered field.

Qualifies Under Youth 5% Provision:

Employment/Dislocation Info.

Old approach had some historically redundant and unnecessary fields

Dislocated Worker Category:* Not Applicable (Not Eligible for Dislocated Worker)
 Terminated/Laid Off, Unlikely to Return to Previous Occupation
 Received Notice of Substantial Layoff/Plant Closure
 Was Self-Employed; Lost Work Due to Economic Conditions/Disaster
 Displaced Homemaker

Unemployment Insurance:* No

Displaced Homemaker:
 Referred - Worker Profiling & Reemployment Service:
 Union Membership:
 Union Callback Rights:

Application - Other Client Information

NEW APPROACH

Application – Eligibility Determination Changes Youth 5% Provision

Youth 5% is calculated by TrackOne, based on the information entered by the user.

Application - Eligibility

The applicants eligibility is displayed below based on calculations from the application.

A - Adult:
 B - Low Income Adult:
 D - Dislocated Worker:
 F - Youth (14 - 18):
 G - Youth (19 - 21):
 I - Youth (14 - 18) 5 Percent Window:
 J - Youth (19 - 21) 5 Percent Window:
 Combined WIA Eligibility Code: ABG

Employment/Dislocation Info.

Some historically redundant and unnecessary fields are no longer present.

Dislocated Worker Category:* Not Applicable (Not Eligible for Dislocated Worker)
 Terminated/Laid Off, Unlikely to Return to Previous Occupation
 Received Notice of Substantial Layoff/Plant Closure
 Was Self-Employed; Lost Work Due to Economic Conditions/Disaster
 Displaced Homemaker

Unemployment Insurance:* No

Weeks Unemployed:* 1

Application - Other Client Information

OLD APPROACH

Application – Eligibility Determination Changes Family/Income

The old approach did not have the regional poverty level tables in the eligibility determination logic.

Family Information-Please complete the following information.

Family Status:

Number In Family:

Number Of Dependents:

Family Income for previous 6 Months:

Low Income:

Food Stamps:

TANF:

General Assistance:

Refugee Cash Assistance:

SSI-SVA Title XVI:

Eligibility Codes

Application - Eligibility

The applicants eligibility is displayed below based on calculations from the application.

A - Adult:

B - Low Income Adult:

D - Dislocated Worker:

F - Youth (14 - 18):

G - Youth (19 - 21):

H - Veteran Grant:

I - Youth (14 - 18) 5 Percent Window:

J - Youth (19 - 21) 5 Percent Window:

S - Self Sufficiency:

Combined WIA Eligibility Code:

NEW APPROACH

Application – Eligibility Determination Changes Family Income

The regional poverty level tables are now integrated into the eligibility logic. The Low Income field is now a calculated field which cannot be changed.

Family/Income-Income information is required only for Youth seeking to qualify based on income. Fill in the information below, and the system will determine eligibility for Low Income status.

Number In Family:

Family Income for previous 6 Months:

Homeless:

Foster Child:

Food Stamps:

TANF:

General Assistance:

Refugee Cash Assistance:

SSI-SVA Title XVI:

Low Income:

Eligibility Codes

Application - Eligibility

The applicants eligibility is displayed below based on calculations from the application.

A - Adult:

B - Low Income Adult:

D - Dislocated Worker:

F - Youth (14 - 18):

G - Youth (19 - 21):

I - Youth (14 - 18) 5 Percent Window:

J - Youth (19 - 21) 5 Percent Window:

Combined WIA Eligibility Code:

Service Hierarchy

Service Search Screen & Service Hierarchy

OLD APPROACH

Service Hierarchy

Service Search Screen & Service Hierarchy

Available Services/Activities

Click on the **Search** button to see a list of all activities, services, and training programs available to the client through the Work One system and other approved service providers. To filter the list, you can select a general **Category** (Case Management, Training Programs, Support, etc.), and/or a specific **Service Type** (Line Code). You can also type in a full or partial **Provider Name** and/or **Service Title** to match in the listing.

After you have located the desired service in the list, click on it to select it and return to the WIA Activity screen.

Category: -- SELECT --
Service Type: -- SELECT --
Provider Name: WIA Supportive Services
 WIA Core
Service/Program Title: WIA Case Management
 WIA Training
 WIA Youth
 Partner Services
 Wagner-Peyser Services
 TAA Services

Search Cancel

NEW APPROACH

Service Hierarchy

Service Search Screen & Service Hierarchy

The service hierarchy has been revised to highlight those services which move a client into the WIA performance calculations.

Available Services/Activities

Click on the **Search** button to see a list of activities, services, and training programs available through the Work One system, **for which this client has been determined eligible**.

To filter the list, you can select a general **Category** (Case Management, Training Programs, Support, etc.), and/or a specific **Service Type** (Line Code). You can also type in a full or partial **Provider Name** and/or **Service Title** to match in the listing. After you have located the desired service in the list, click on it to select it and return to the WIA Activity screen.

Category: -- SELECT --
Service Type: -- SELECT --
Provider Name: Supportive Services - Sign. Staff Assist
 Core Self-Service
Service/Program Title: Intensive - Sign. Staff Assist
 Training Services - Sign. Staff Assist
 Youth Services - Sign. Staff Assist
 Partner Services
 Follow Up
 TAA Specific Services - Sign. Staff Assist
 Core - Staff Assisted

Cancel

Add/Record 1st Intensive Service

Service Search Screen

OLD APPROACH

Add/Record 1st Intensive Service

Model: TrackOne **did not** require an application to record an intensive service. However, it has always been part of DWD tiered services policy.

Service Search Screen

The service search screen **did not** limit/filter the available services based on the client's location in the service delivery model or on eligibility criteria.

Descriptive text at the top of the service search screen is different.

TrackOne returns (and allows) any and all services to be recorded for the client.

NEW APPROACH

Add/Record 1st Intensive Service

Model: TrackOne now mirrors the DWD tiered services policy. An application and the necessary documentation **are required**, before TrackOne will allow you to record an intensive service.

Service Search Screen

The service search screen **does** limit/filter the available services based on the client's location in the service delivery model or on eligibility criteria.

Descriptive text at the top of the service search screen is different.

Provider Name	Service/Program Title	Service Type	Line Code
Indiana WorkOne System	Work w/ client to develop job search plan	Employment Plan	N2
Indiana WorkOne System	ISS/IEP Reveiw & Update Session	Employment Plan	N2
Indiana WorkOne System	Initial ISS/IEP Development Session	Employment Plan	N2
Indiana WorkOne System	Short-term Prevocational Training - Generic	Short Term Prevocational Training	N6

Since this client has an application (open period of participation) then the service search screen returns intensive services.

Funding Stream & Program Enrollment

OLD APPROACH

Add/Record 1st Intensive Service

Funding Stream

Funding stream *is not* filtered based on the individual's eligibility or location in the service delivery process.

Funding Stream:*

All possible funding streams for the service are present. Also the old approach did not have a general "WIA Core" funding stream.

Program Enrollment

User required to identify a link the appropriate open period of participation to the service.

Program Enrollment:*

NEW APPROACH

Add/Record 1st Intensive Service

Funding Stream

Funding stream *is* filtered based on the individual's eligibility or location in the service delivery process.

Funding Stream:*

The available funding streams are based on the individual's eligibility codes from the application screen. This client is only eligible for WIA-Adult and WIA Youth. (This particular service is not setup for WIA Youth so the only choice is WIA-Adult.)

Program Enrollment

The Program Enrollment field is no longer a user defined field. TrackOne automatically attaches the open/active program enrollment (period of participation) to the service.

Print Service Detail

OLD APPROACH

Add/Record 1st Intensive Service

Print Service Detail

Previously there was not a way to print an individual service record for the client.

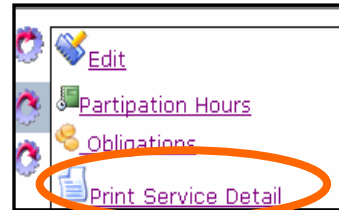


NEW APPROACH

Add/Record 1st Intensive Service

Print Service Detail

There is now a Print Service Detail selection on the Service record action icon. This will print a 1-page summary of the selected service record along with additional information on the client's period of participation associated with the individual service.



Identifying Information	
Name:	DOE, PAUL
SSN:	000-00-6572

Service / Activity Information		
Begin Date:	09/01/2005	Service / Activity Title: On-the-Job Training
Status:	2	Planned End Date: 09/25/2006 Actual End Date: 09/25/2006
Category:		Line Code: 15 Service Type:
Provider:	Indiana WorkOne System	Funding Stream: WIA-Adult
TrainingProviderID:		O*Net Code:
Summary Description:		
Service Notes:		
Record Created By:	Jeff Murphy	Created Date: 01/10/2007

Period of Participation Information	
As of Today's Date:	
Participation Date:	07/14/2003 Intake Site: TAA - FORT WAYNE
Last Service Date:	09/25/2006 Official Exit Date:
1st Core Service:	1st Intensive Service:
1st Training Service:	08/25/2003 Last Training Service: 09/25/2006
Program Participation	
1st Adult Service:	09/01/2005 1st TAA Service: 08/25/2003
1st Dsl Worker Service:	1st RR Service:
1st Youth Service:	1st NEG Service:

Setting up Accounts

Accounts and Eligibility Determination

OLD APPROACH

Setting up Accounts

Accounts and Eligibility Determination

Previously, the user was responsible for selecting the appropriate accounts for which the client is eligible. All available accounts for the region were displayed on the Account setup screen.

Source	Max. Amount	Begin Date*	End Date*	Acct Total*
<input type="checkbox"/> WIA-DislWrkr Support - PY06-07 - Region 8 - 2007	\$7,000.00			
<input type="checkbox"/> WIA-DislWrkr ITA - PY06-07 - Region 8 - 2007	\$7,000.00			
<input type="checkbox"/> WIA-Adult ITA - PY06-07 - Region 8 - 2007	\$5,000.00			
<input type="checkbox"/> WIA-Adult Support - PY06-07 - Region 8 - 2007	\$5,000.00			
<input type="checkbox"/> WIA-Youth ITA - PY06-07 - Region 8 - 2007	\$5,000.00			
<input type="checkbox"/> WIA-Youth Support - PY06-07 - Region 8 - 2007	\$5,000.00			
Grand Total:				0.00

NEW APPROACH

Setting up Accounts

Accounts and Eligibility Determination

TrackOne now drives the account setup selection based on the eligibility codes from the Application. The only available accounts are the ones for which the client is eligible.

Source	Max. Amount	Begin Date*	End Date*	Acct Total*
<input type="checkbox"/> WIA-Adult ITA - PY06-07 - Region 8 - 2007	\$3,000.00			
<input type="checkbox"/> WIA-Adult Support - PY06-07 - Region 8 - 2007	\$500.00			
<input type="checkbox"/> WIA-Youth Support - PY06-07 - Region 8 - 2007	\$500.00			
Grand Total:				0.00

Planned Gap In Service

Location of Planned Gap in Services

OLD APPROACH

Location of Planned Gap in Services

Previously, planned gaps in services were located with the other services/activities.

The client's activities/services are displayed below. The most recent items are listed first. To add a new activity, click the **Add New** button. To edit an existing activity, click the Action icon next to the desired record and select **Edit** from the menu.

2 records found.

Begin Date	Title	Service Type	Line Code	Planned End Date	Actual End Date	Provider
1/1/2007	Gap in Service - Delay before start of training	Gap in Service - Delay Before Start of Training	GT	5/1/2007		Indiana WorkOne System
12/31/2006	1-on-1 Counseling and Career Planning	Counseling and Career Planning	N4	12/31/2006	12/31/2006	WorkOne System

NEW APPROACH

Location of Planned Gap in Services

The “Planned Gap in Service” records have now been moved under the Enrollment Action Icon. The historical gaps were moved to the new location.

The list below displays the client's applications. To record a new application, click the **New Application** button. To edit an existing application, select the **Edit Application** option from the **Action** menu next to the desired record. If the application has been processed and the client is acceptable for enrollment, select the **Enrollment** option from the **Action** menu to add or edit the enrollment.

1 records found.

Enroll Date	Exit Date	App. Date	Interviewer	Organization	Eligibility
		12/31/2006	Jeff Murphy	Vincennes - Greene	ABG

- Edit Registration
- Edit Application
- Accounts
- Monthly Contact
- Follow Ups
- Exit Information
- Planned Gap in Service

Recording a Planned Gap in Service

OLD APPROACH

Recording a Planned a Gap in Service

Previously, gaps in services were recorded as a service/activity.

Activity

To add an activity, enter the following information.

Begin Date:* 01/01/2007
Service/Activity Title:* Gap in Service - Delay before start of traini
Category: WIA Case Management
Line Code: GT
Service Type: Gap in Service - Delay Before Start of Training
Provider: Indiana WorkOne System
Funding Stream:* WIA-Adult
Program Enrollment: 12/31/2006 - WIA/W-P
Training Provider ID:
O*Net Code:
Summary Description:
Status:* Active
Planned End Date:* 05/01/2007
Actual End Date:
Record Created By:
Date Created:

Service Notes-A notes field is provided for any justification, rationale or detailed information necessary for monitoring purposes. Please use accordingly. Notes in this field will be viewable by all users.

Service Notes:

NEW APPROACH

Recording a Planned Gap in Service

The “Planned Gap in Service” records have now been moved under the Enrollment Action Icon. The historical gaps were moved to the new location.

TrackOne Add Enrollment Hold

TrackOne Add Enrollment Hold

Reason for Hold:* Delay in Start of Training Program
Begin Date:* 01/01/2007
Plan End Date:* 05/01/2007
End Date:
Notes:

Save Pause Cancel

Closing a Planned Gap in Service

OLD APPROACH

Closing a Planned a Gap in Service

Previously, the gap in service record was accessed from the service history screen. It was opened and the status changed to Completed and the Actual End Date was entered.

Activity
To add an activity, enter the following information.

Begin Date:* 01/01/2007

Service/Activity Title:* Gap in Service - Delay before start of training

Category: WIA Case Management

Line Code: GT

Service Type: Gap in Service - Delay Before Start of Training

Provider: Indiana WorkOne System

Funding Stream:* WIA-Adult

Program Enrollment: 12/31/2006 - WIA/W-P

Training Provider ID:

O*Net Code:

Summary Description:

Status:* Completed

Planned End Date:* 05/01/2007

Actual End Date:* 01/01/2007

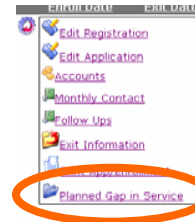
Record Created By: Jeff Murphy

Date Created: 1/1/2007

NEW APPROACH

Closing a Planned Gap in Service

The “Planned Gap in Service” records have now been moved under the Enrollment Action Icon. The historical gaps were moved to the new location.



Go to the App. & Enroll screen. Select Planned Gap in Service from Action icon.

Select Edit on the next screen.

TrackOne Planned Gap Search

TrackOne Planned Gap Search

Cancel

1 records found.

	Hold Reason	Begin Date	Plan End Date	End Date
	Delay in Start of Training Program	1/1/2007	5/1/2007	

TrackOne Add Enrollment Hold

TrackOne Add Enrollment Hold

Reason for Hold: Delay in Start of Training Program

Begin Date: 1/1/2007

Plan End Date: 05/01/2007

End Date:

Notes:

Save Pause Cancel

Enter the End date. Note: the Begin Date is read only. Once the Gap is closed it is not visible to the user. It is stored in the database, but not visible to the user.

Intake Site & Regional/Service Provider Assignment

Location & Switching Intake Site

OLD APPROACH

Location & Switching Intake Site

Previously, the user was not able to reassign a client to a new service provider location and/or region. The assignment was based on the organization which created the application. The Application and Enrollment screen did not identify the Intake site.

The list below displays the client's applications. To record a new application, click the **New Application** button. To edit an existing application, select the **Edit Application** option from the **Action** menu next to the desired record. If the application has been processed and the client is acceptable for enrollment, select the **Enrollment** option from the **Action** menu to add or edit the enrollment.

1 records found.

App. Date	Interviewer	Intake Site	Eligibility	Enroll Date	Exit Date
12/31/2006	Jeff Murphy	???	ABG	12/31/2006	

The Application itself did not have an intake site field.

Application - Basic Client Information

Application Date:* 12/31/2006
 Planned Exit Date:
 Intake Site: ???

Applicant Information-Identify the following basic information about the applicant. If these values are empty, you must return to the edit client record to update

Name: Doe, JaneTest
 Address:* 123 Main Street

NEW APPROACH

Location & Switching Intake Site

The site/region assignment is still based on the organization creating the application, but now Master Users will be allowed to change the intake site. The new Application and Enrollment screen now has an Organization column which is the site which created the application. This site/region will get credit for this client for all TrackOne reports.

The list below displays the client's applications. To record a new application, click the **New Application** button. To edit an existing application, select the **Edit Application** option from the **Action** menu next to the desired record. If the application has been processed and the client is acceptable for enrollment, select the **Enrollment** option from the **Action** menu to add or edit the enrollment.

1 records found.

Enroll Date	Exit Date	App. Date	Interviewer	Organization	Eligibility
12/31/2006		12/31/2006	Jeff Murphy	Vincennes - Greene	ABG

The Application now has the intake site at the top of the screen.

Application - Basic Client Information

Application Date:* 12/31/2006
 Planned Exit Date:
 Organization: Vincennes - Greene

Applicant Information-Identify the following basic information about the applicant. If these values are empty, you must return to the edit client record to update

Name: Doe, JaneTest
 Address:* 123 Main Street

Note: The example above shows the Organization as read only. That is because, the user's workgroup does not have edit rights to the intake site. Master Users will have the edit rights and can change the intake site.

TrackOne Reports

Location & Available Reports

OLD APPROACH

Location & Available Reports

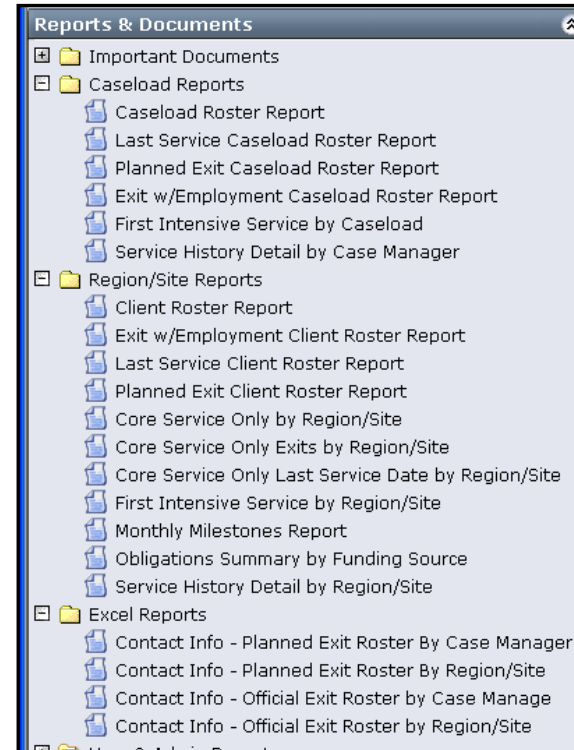
Caseload and Regional Reports were all inside the Transition Reports folder.



NEW APPROACH

Location & Available Reports

Several new reports added and the folder structure is a little more intuitive.

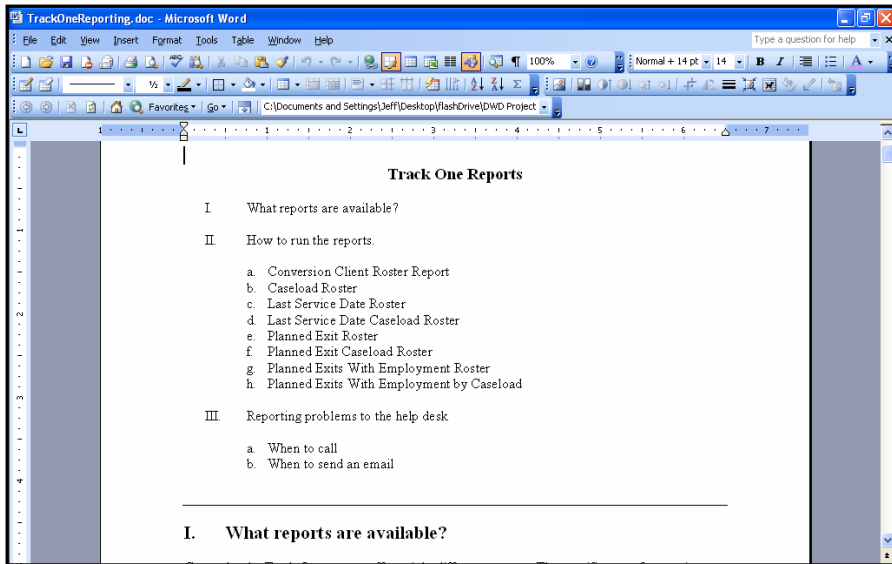
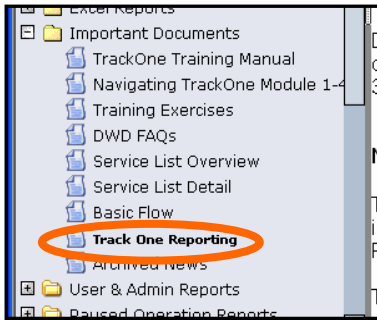


“How to” Instructions

OLD APPROACH

“How to” Instructions

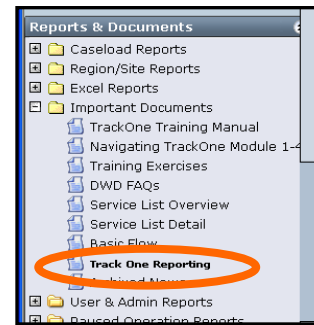
Documentation was located in the “Important Documents” folder. There were two documents: “Track One Reports.doc” and “TrackOne Excel Exports.Doc.”



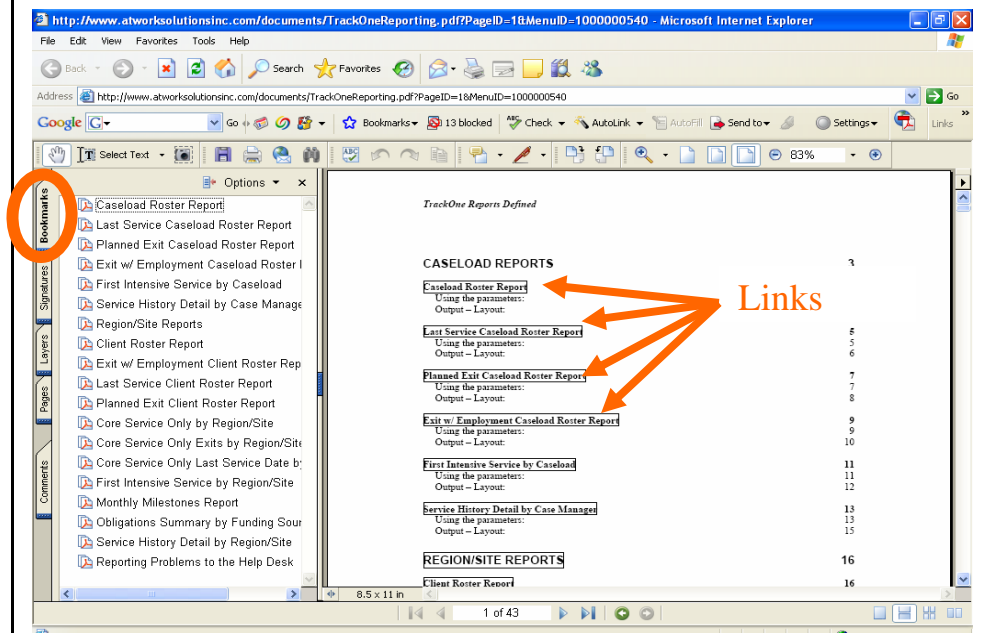
NEW APPROACH

“How to” Instructions

Documentation is still located in the “Important Documents” folder. There are still two documents: “Track One Reports.pdf” and “TrackOne Excel Exports.Doc.”



The “Track One Reports.pdf” now has bookmarks and links in the table of contents for easy reference.



Alerts – 60 day and 90 day with no service alerts

Alerts on User Home Page

OLD APPROACH

Alerts on User Home Page

Alerts on the user home page appeared very similar.

Alerts				
Message	Priority	Start Time	End Time	Go To
Smith, Jamie has been exited -- no service since 08/01/2006.	Medium	9/30/2006 12:00:00 AM		
GapTest, Joe has been exited -- no service since 07/04/2006.	Medium	9/2/2006 12:00:00 AM		
DOE, AHMED I has been exited -- no service since 08/30/2006.	Medium	11/28/2006 12:00:00 AM		
DOE, BRIANNA L hasn't received a service since 10/09/2006.	Medium	12/8/2006 12:00:00 AM		
Mannings, Peyton hasn't received a service since 10/13/2006.	Medium	12/12/2006 12:00:00 AM		
DOE, COZETTE L hasn't received a service since 10/20/2006.	Medium	12/19/2006 12:00:00 AM		
DOE, AHMED I has been exited -- no service since 09/01/2006.	Medium	11/30/2006 12:00:00 AM		
DOE, MELISSA S has been exited -- no service since 08/01/2006.	Medium	10/30/2006 12:00:00 AM		
DOE, BRIANNA L has been exited -- no service since 10/09/2006.	Medium	1/7/2007 12:00:00 AM		

NEW APPROACH

Alerts on User Home Page

There is now a distinct difference between the 60 and 90 day alerts.

- The 60 day alerts are **BLUE** and the “Priority” is Medium.
- The 90 day (or SOFT-EXIT) alert is now **RED** and the “Priority” is High.

Alerts				
Message	Priority	Start Time	End Time	Go To
Smith, Jamie has been exited -- no service since 08/01/2006.	High	9/30/2006 12:00:00 AM		
GapTest, Joe has been exited -- no service since 07/04/2006.	High	9/2/2006 12:00:00 AM		
DOE, AHMED I has been exited -- no service since 08/30/2006.	High	11/28/2006 12:00:00 AM		
DOE, BRIANNA L hasn't received a service since 10/09/2006.	Medium	12/8/2006 12:00:00 AM		
Mannings, Peyton hasn't received a service since 10/13/2006.	Medium	12/12/2006 12:00:00 AM		
DOE, COZETTE L hasn't received a service since 10/20/2006.	Medium	12/19/2006 12:00:00 AM		
DOE, AHMED I has been exited -- no service since 09/01/2006.	High	11/30/2006 12:00:00 AM		
DOE, MELISSA S has been exited -- no service since 08/01/2006.	High	10/30/2006 12:00:00 AM		
DOE, BRIANNA L has been exited -- no service since 10/09/2006.	High	1/7/2007 12:00:00 AM		
Smith, Jamie hasn't received a service since 10/25/2006.	Medium	12/24/2006 12:00:00 AM		
DOE, BRIANNA L hasn't received a service since 10/19/2006.	Medium	12/18/2006 12:00:00 AM		
DOE, JEFF hasn't received a service since 10/25/2006.	Medium	12/24/2006 12:00:00 AM		

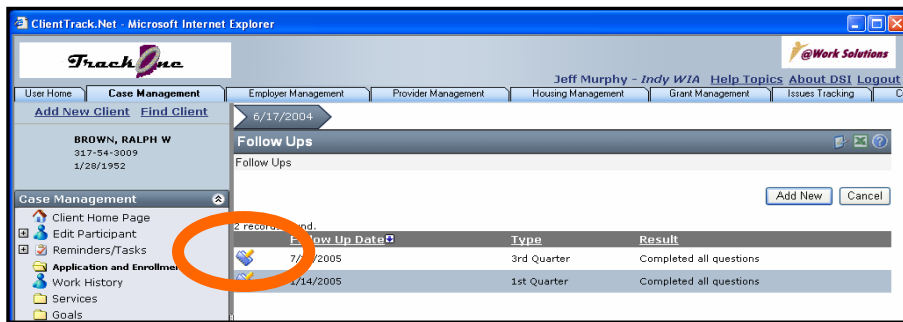
Follow Up Contacts

Print Follow Up Contact Sheet

OLD APPROACH

Print Follow Up Contact Sheet

Previous version did not have a Print Follow Up Contact option.



NEW APPROACH

Print Follow Up Contact Sheet

A Print follow Up contact sheet is now an option.

