Introduction to TrackOne Navigation
Table of Contents

Getting Started

Welcome to TrackOne! There are a numerous ways to access the various menus, enter data, and track information in TrackOne. This user guide is designed to introduce you to the program and to explain the basic setup procedure.

First, in order for the program to work properly, please check the system requirements listed below and make any necessary adjustments.

Use a computer with DSL or faster connection to the Internet

Make sure the computer you are using has a DSL or faster connection to the Internet before you begin using TrackOne.

Use a computer with Internet Explorer 5.5 or higher

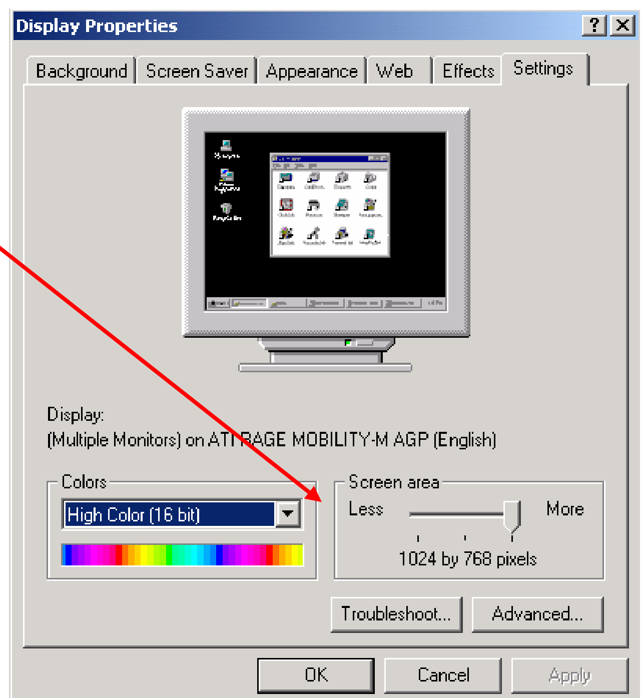
TrackOne is designed to run on Microsoft Internet Explorer version 5.5 and higher. Operation of TrackOne depends on the browser, *not* the operating system installed on the computer. If the system will run Internet Explorer 5.5 or higher, TrackOne should operate normally. The program will not operate properly on other browsers, such as Netscape Navigator, Firefox, or Safari.

Set your video display to 1024 x 768

Certain pages in TrackOne will not display properly in resolutions less than 1024x768, although higher resolution settings are fine.

To set your video display (Windows 2000 Pro)

1. Go to your **Control Panel**.
2. Open **Display** and click the **Settings** tab.
3. Under **Screen Area** select **1024x768** pixels.
4. Click **OK**.



Turn pop-up blockers off

You may have Norton Internet Security or any of a number of pop-up blocking software installed on your computer. TrackOne will not work with pop-up blockers in place, so you will need to unblock pop-ups.

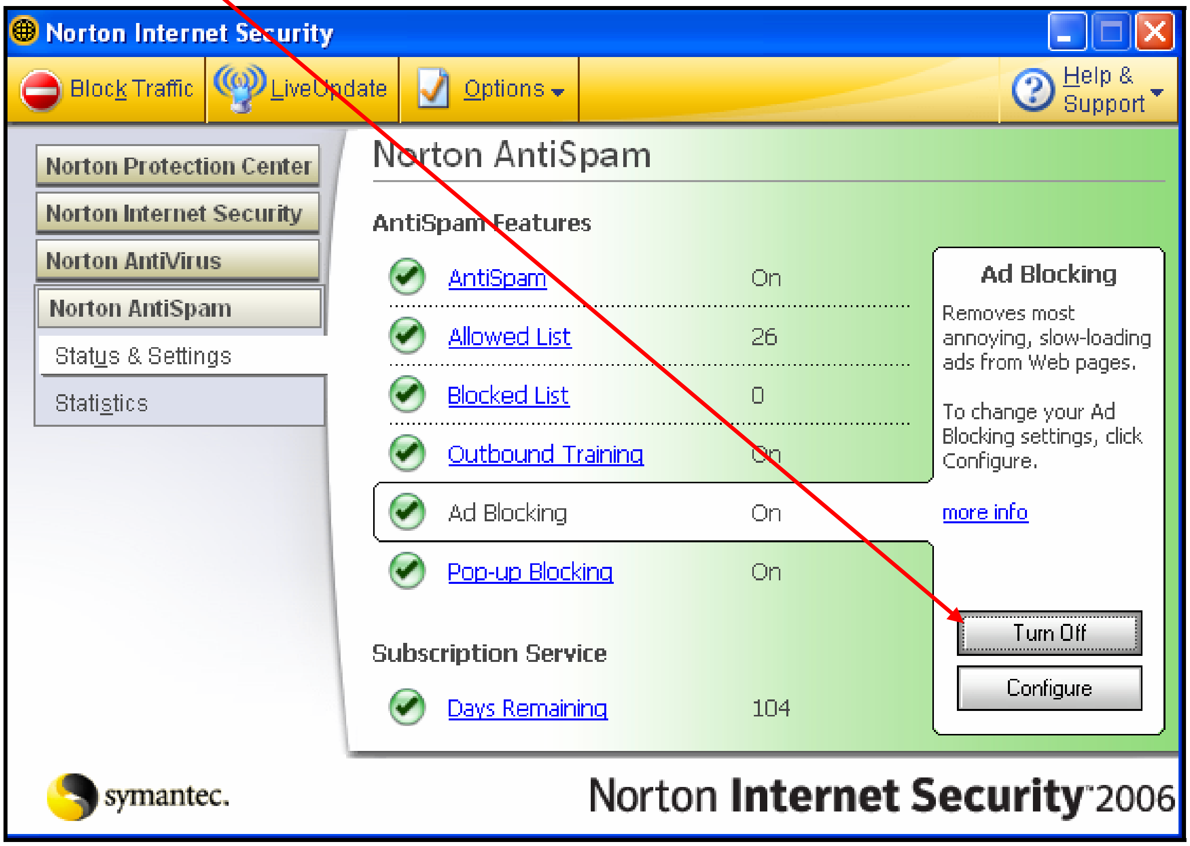
The following screenshots list several ways to turn off pop-up blockers. Depending on your computer's configuration, you may need to do one or more of these options.

To disable the pop-up blocker for common products that may be installed on your system:

To turn off pop-up blocking in Norton Internet Security:

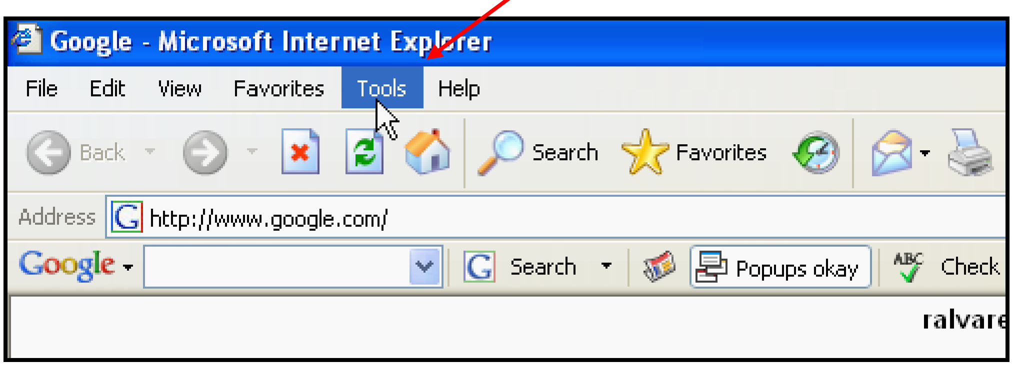
1. Start **Norton Internet Security**
2. In the main window, click **Norton Anti-Spam**

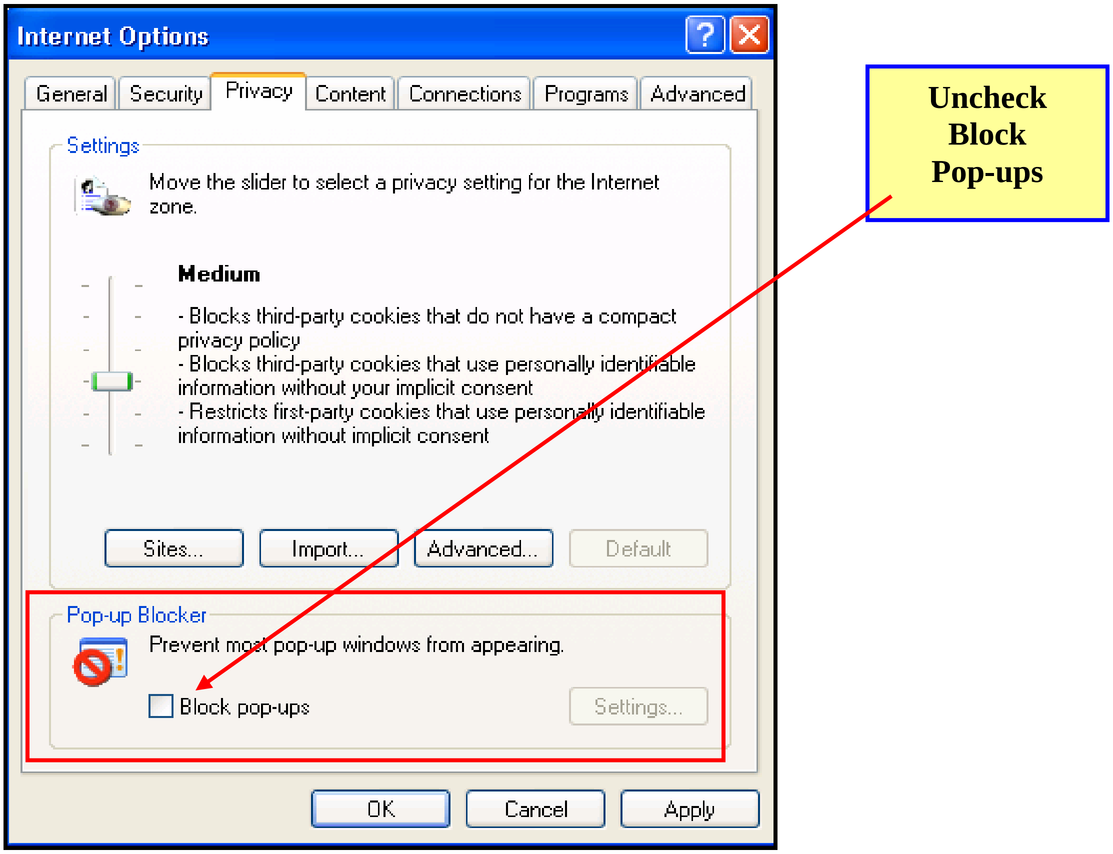
3. Click **Ad Blocking**
4. Click **Turn Off**



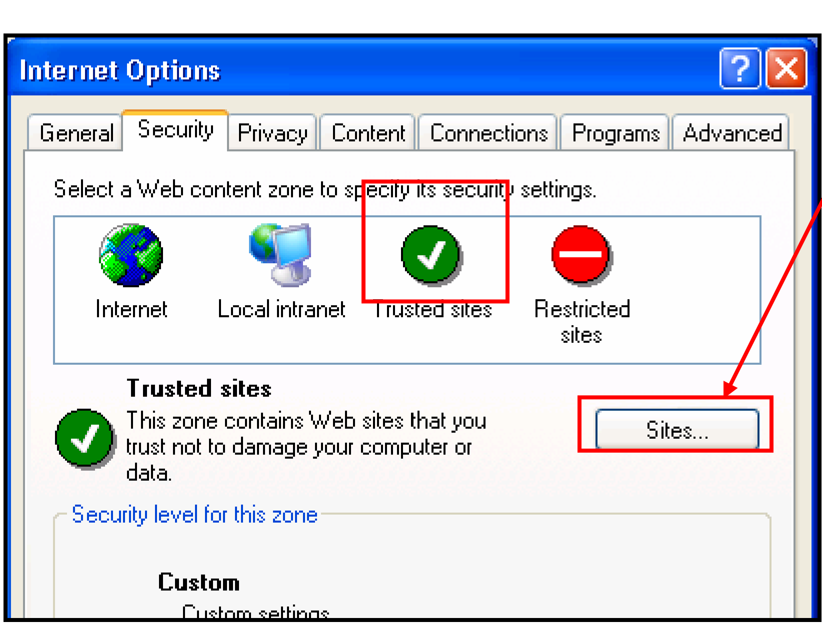
To turn off pop-up blocking in Internet Explorer:

1. In your **Internet Explorer** window, open the **Tools** menu and click **Internet Options**. Click the **Privacy** tab. At the bottom of that window, you'll see a **Block Pop-ups** checkbox. Make sure that box is not checked.

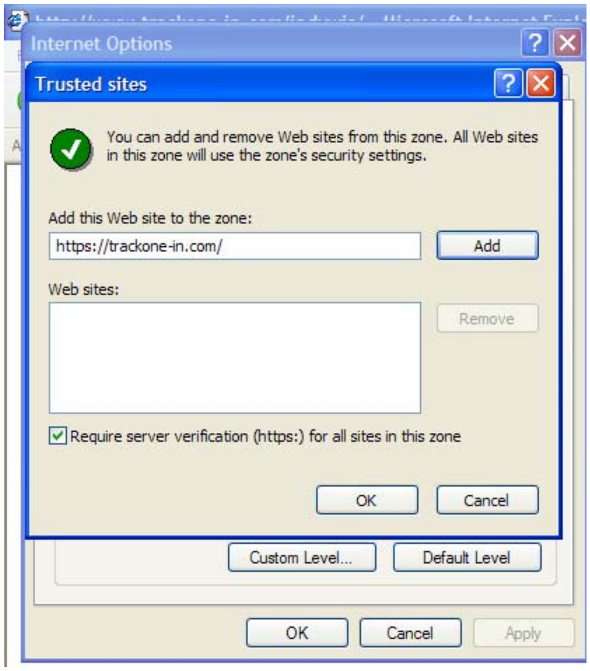




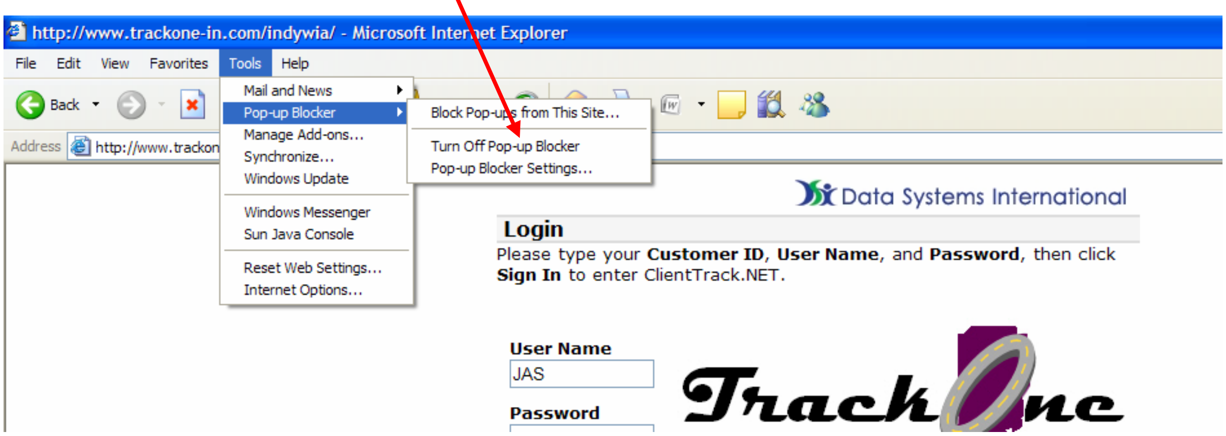
2. In the Internet Explorer toolbar, click **Tools**, then **Internet Options**. On the **Security** tab, click **Trusted Sites** to enable the **Sites** button. Click the **Sites** button.



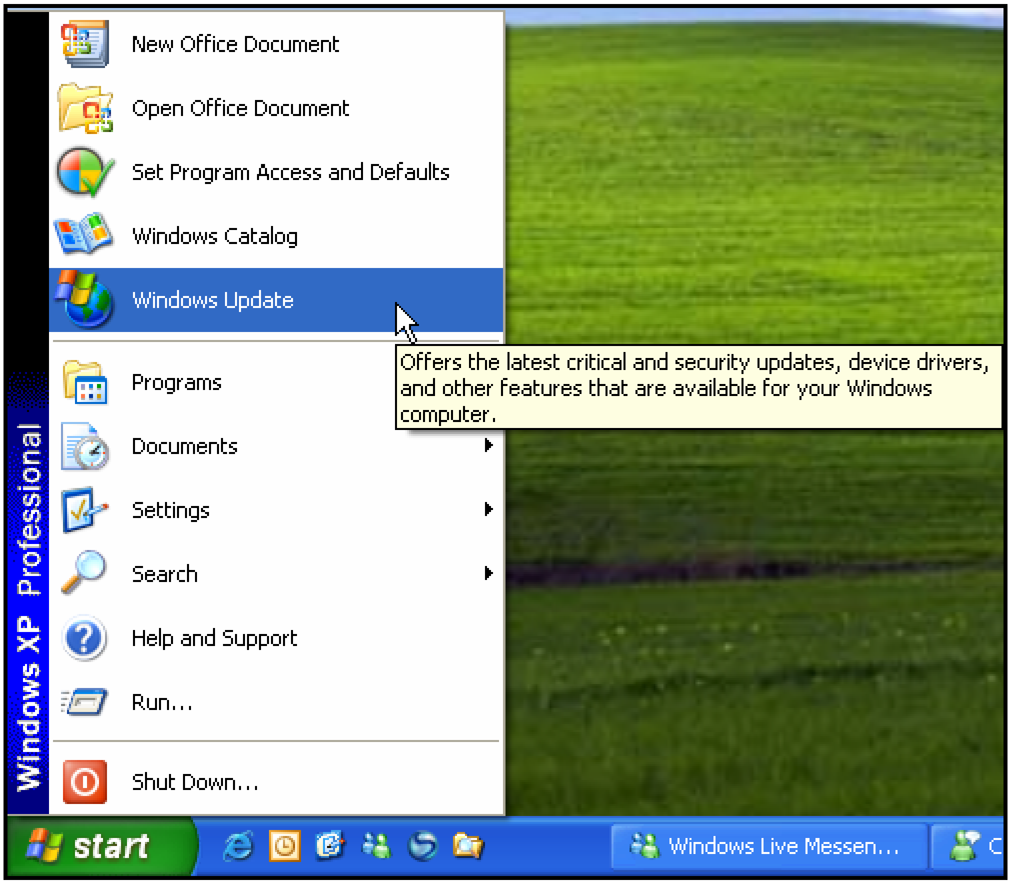
3. In the **Trusted Sites** window, type https://www.trackone-in.com in the **Add this web site to the zone** text box, and click **Add**. Click **OK** when you've added TrackOne to your trusted sites.



4. In the **Internet Explorer** toolbar, click **Tools**, and then scroll your mouse over **Pop-up Blocker** and select **Turn Off Pop-up Blocker**.



If you don't have this option in your **Tools** menu, most likely you do not have the latest update to Internet Explorer. It is recommended that you update your system by using Windows Update located on the start menu.

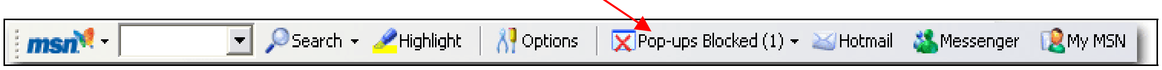


5. Proprietary toolbars (e.g., MSN, Google, and Yahoo) all have built-in pop-up blockers. For each toolbar, you will want to allow pop-ups from the site running TrackOne.

MSN Toolbar

To turn off pop-up blocking on the MSN Toolbar

a. Make sure the **Pop-up Guard** button appears on the toolbar.

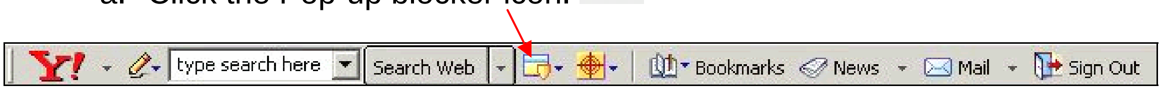


b. If it is not in view, click  and select **Toolbar Options**. In **Toolbar Options**, check the box next to **Pop-ups Blocked**. Click **Save**.
c. On the **Pop-ups Blocked** menu, click **Allow Pop-ups from this Site**. Note: You must be on the **TrackOne** login page in order to allow pop-ups from that site.

Yahoo Toolbar

To turn off pop-up blocking on the Yahoo Toolbar

a. Click the Pop-up blocker icon. 

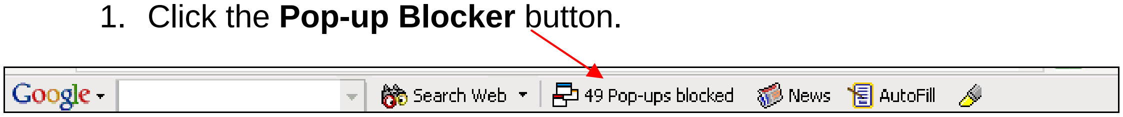


Select **Enable Pop-up Blocker** to uncheck the item.

Google Toolbar

To turn off pop-up blocking on the Google Toolbar

1. Click the **Pop-up Blocker** button.



2. The button text will change to read "**Allow site pop-ups**," indicating that the Popup Blocker is disabled on the site in question.

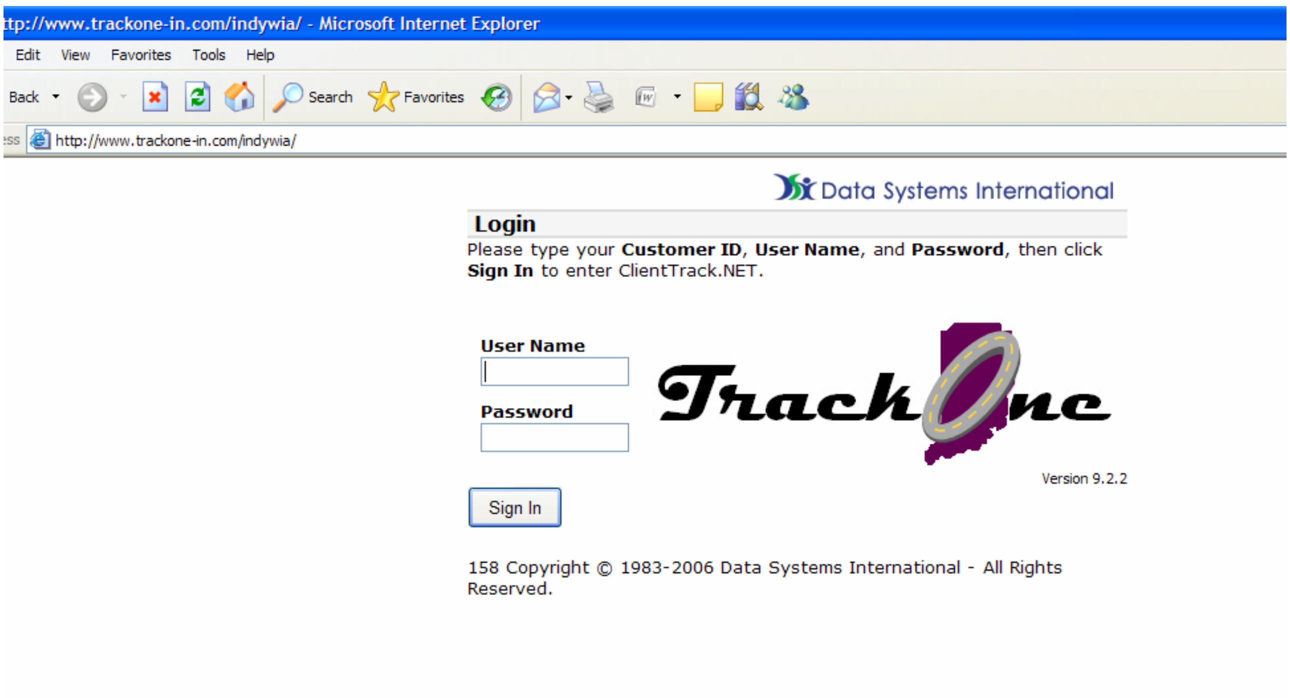
A note on security

Any application is susceptible to hacking. We have taken every measure to secure TrackOne and there are no known holes. Users should use standard desktop security measures, including virus scanning, personal firewall, and malware scanner.

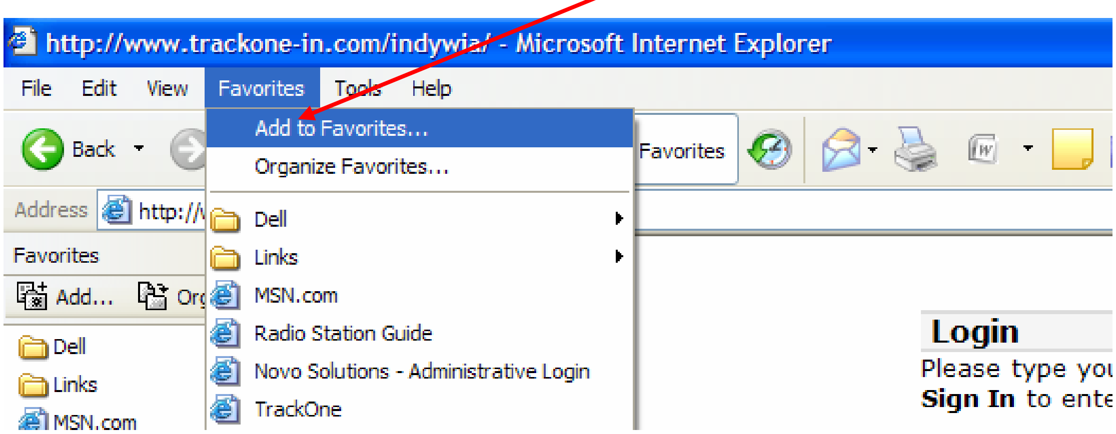
Logging in to TrackOne

1. When you have the appropriate URL, make sure you are connected to the Internet, then start Internet Explorer by doing one of the following:
   1. From the Start menu, select **Programs - Internet Explorer**.
   2. Or click a shortcut to **Internet Explorer** on your desktop or system tray.

2. After the Internet Explorer window opens, type the TrackOne URL provided to you in the address bar and click **Go**. You will then see the **TrackOne Login** page.

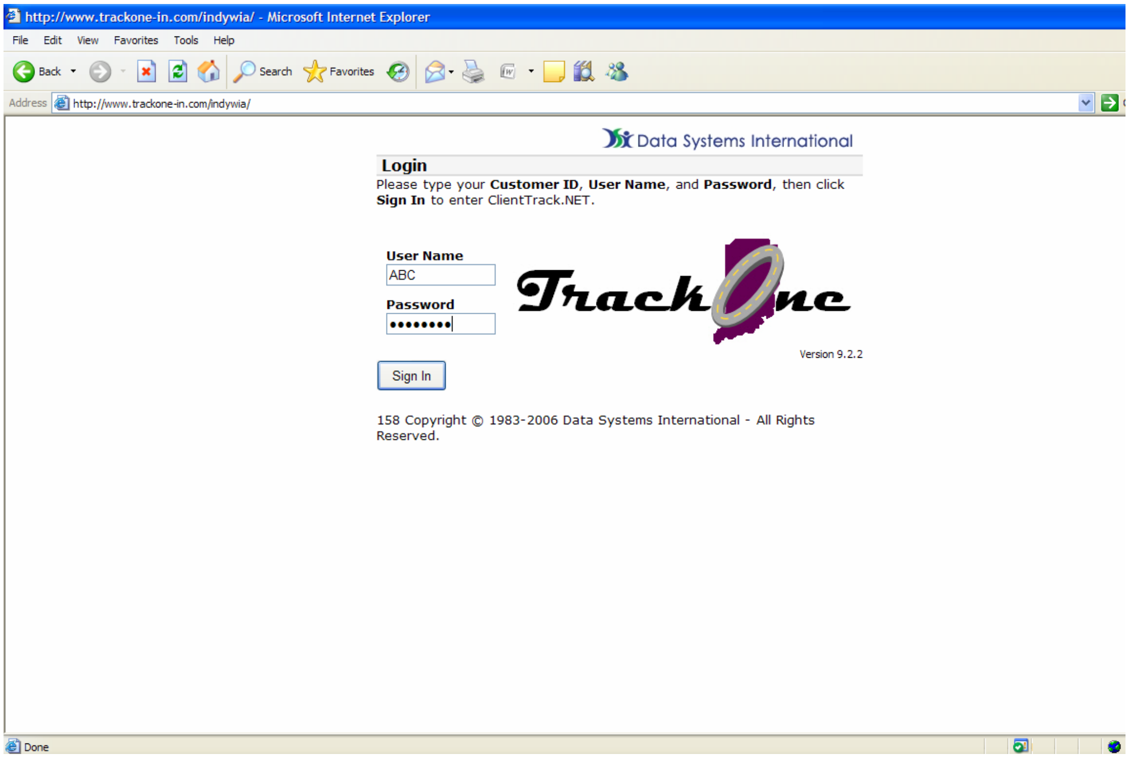


You can also save TrackOne to your Internet Explorer **Favorites** or create a shortcut on your desktop for quick access.



Logging in

Log in to TrackOne by typing the **User Name** and ***case sensitive*** **Password** provided to you. Click **Sign In** or hit **Enter** on the computer keyboard.



After logging in, a new window will open in the task bar at the bottom of the page. The new window is TrackOne. When the application is fully loaded, the window will open.

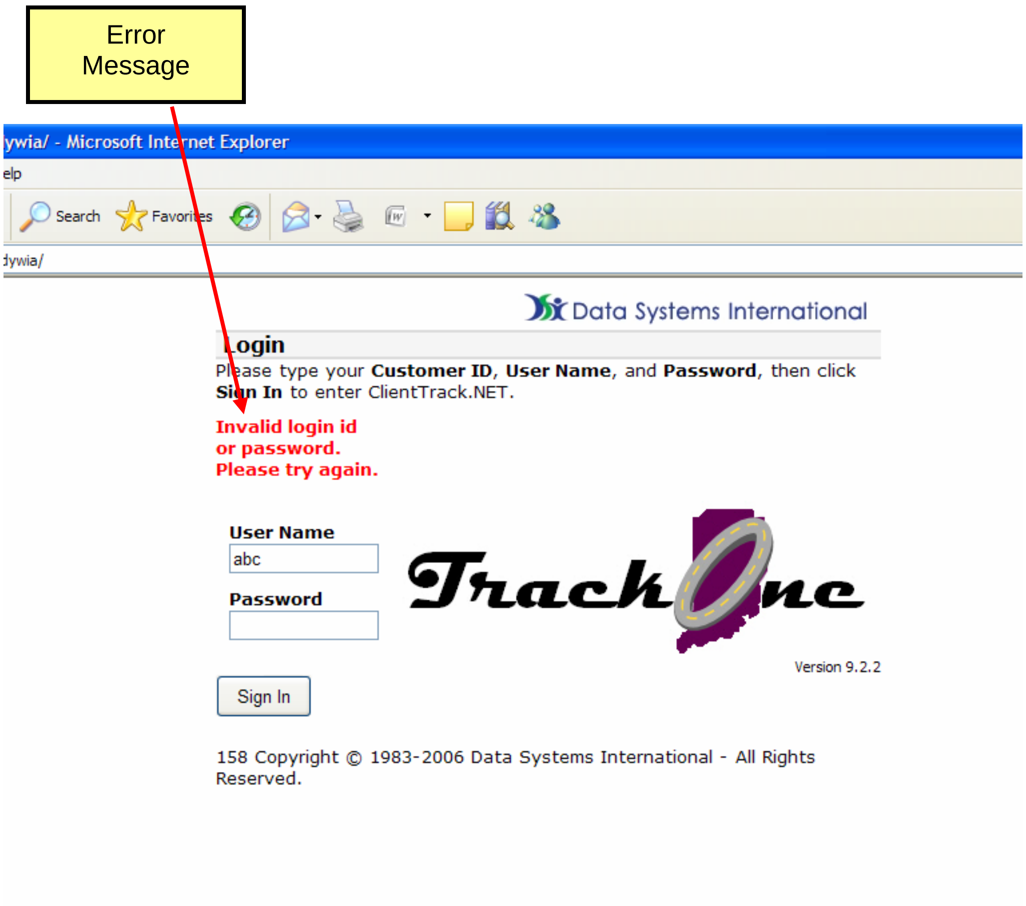
NOTE: **Keep the login window open while working with the application.**

Login Errors

This section lists the common problems users may encounter while logging in.

Invalid login or password:

If you receive the error shown below when you try to sign in, double-check your login information. Remember that your user name is *NOT* case sensitive, but the password *IS.* Also, ensure that **CAPS LOCK** on the computer keyboard is turned off.



No second window appears:

If you typed your User Name and Password, clicked Sign In and nothing happens, check the task bar at the bottom of your computer screen to see if another Internet Explorer window is open and minimized. If there is another window, click it, and you will see the TrackOne home page.
If there is no second Internet Explorer window open and minimized on the task bar, most likely a pop-up blocker has prevented the TrackOne home page from opening. Verify that all pop-up blockers are turned off as described above.

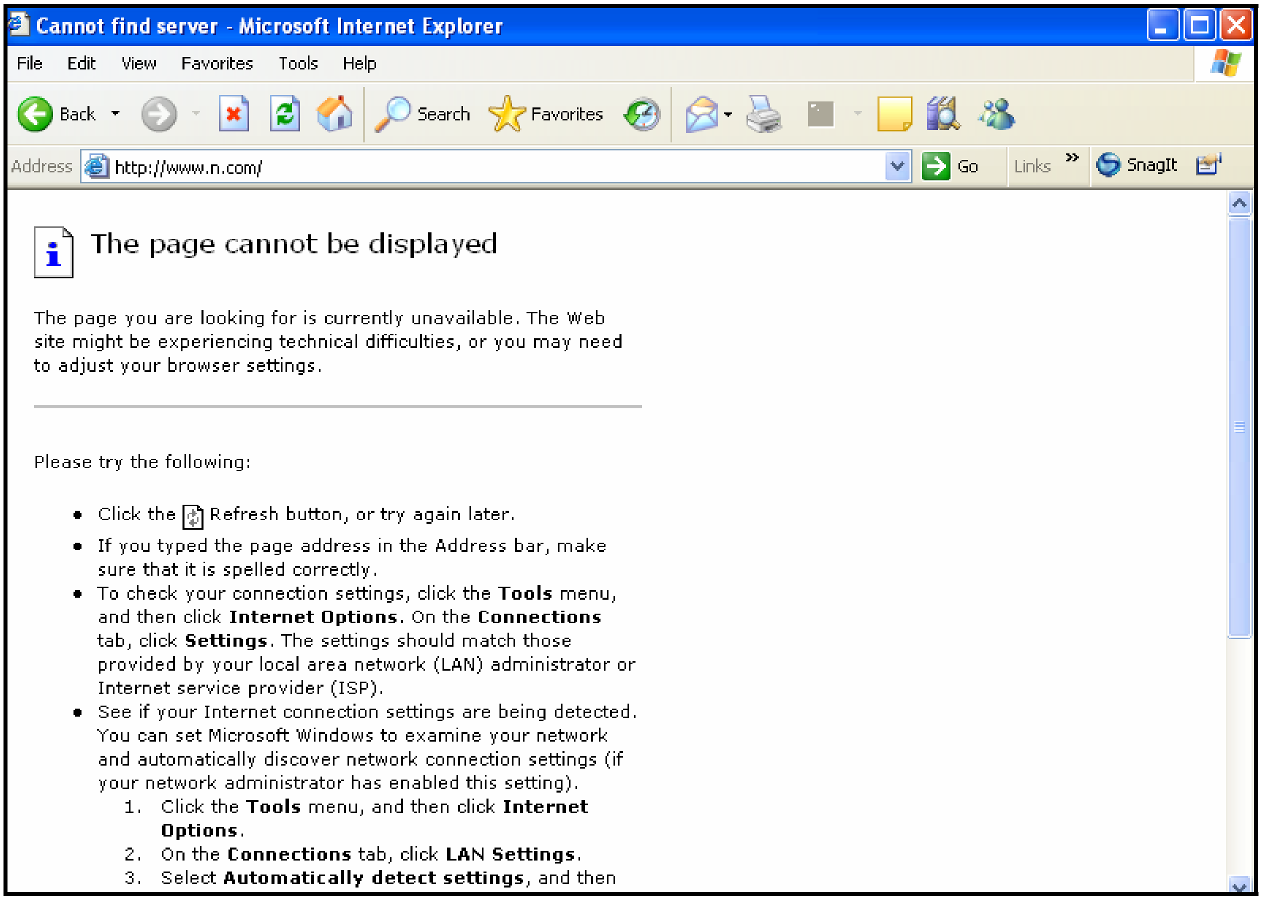
Troubleshooting

Here are typical steps you may take to resolve some problems.

Internet Explorer "The page cannot be displayed" error

Troubleshooting steps:

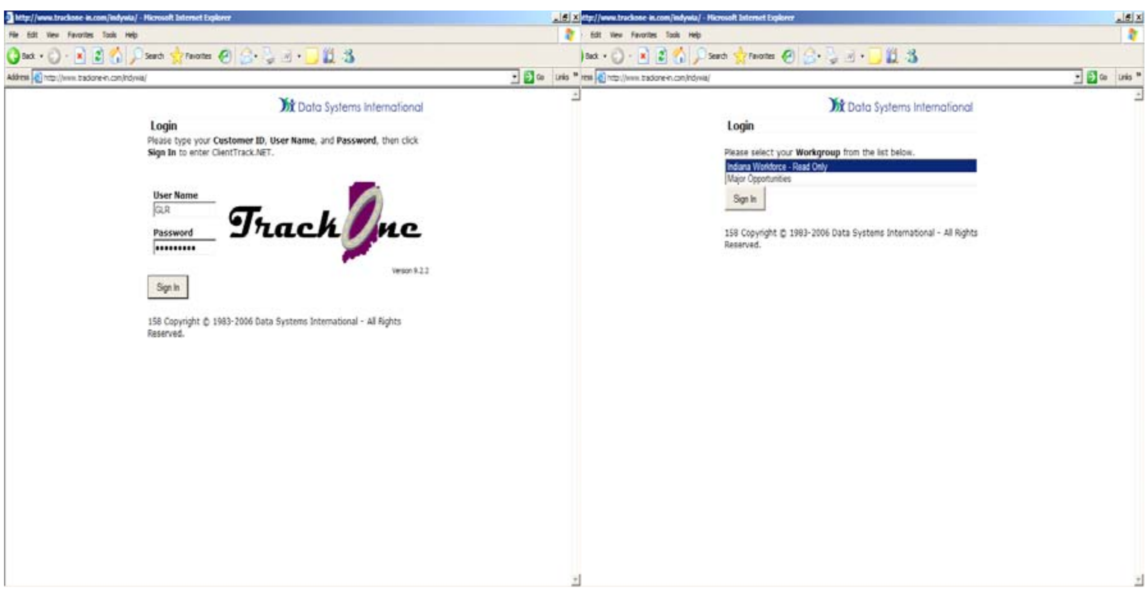
- Verify Internet connection.
- Right click mouse in the page, and then click **Refresh.**

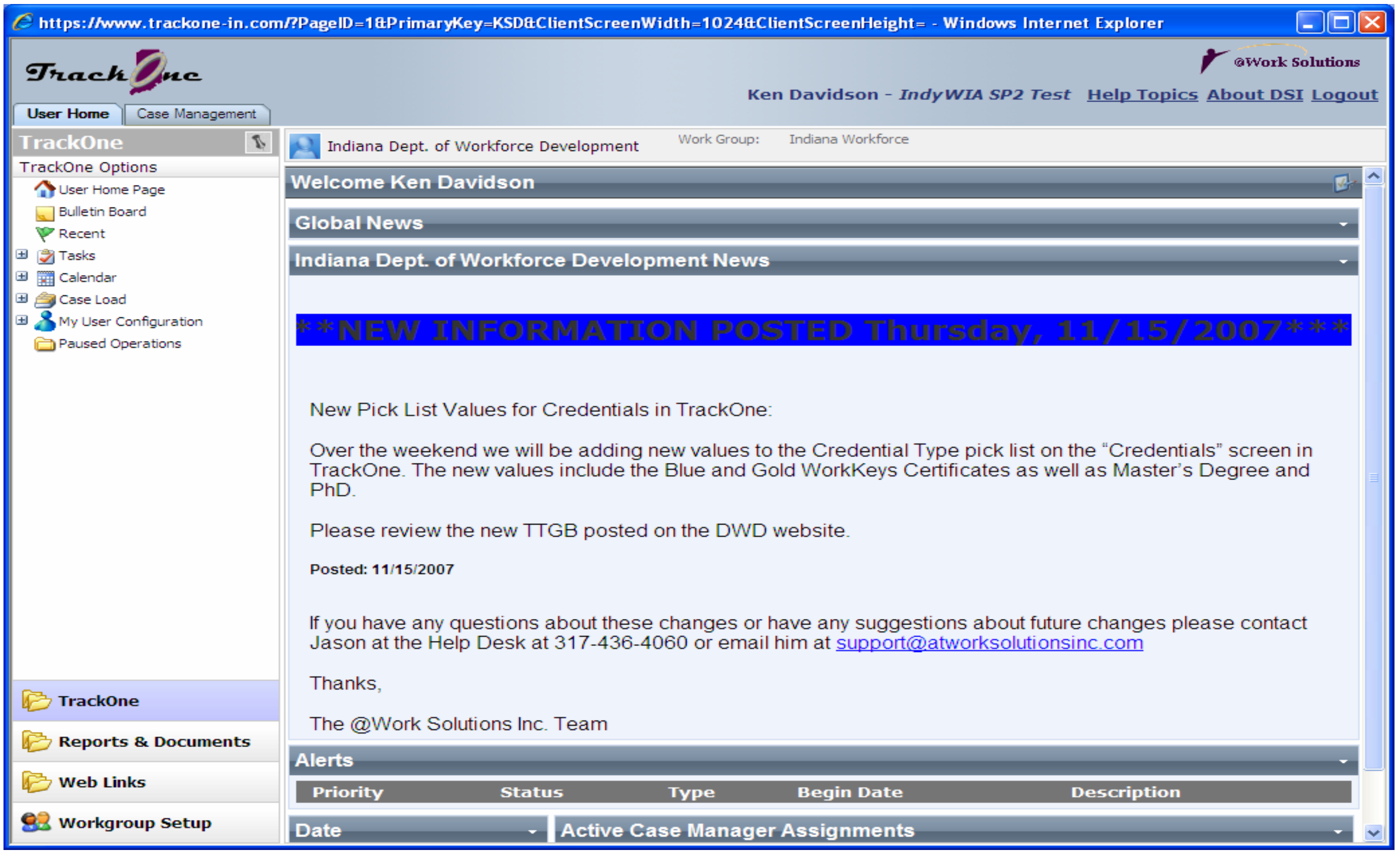


Basic Navigation

As with any software program, the main ingredient to successful use is learning the features and how to navigate through the program. TrackOne, as its name implies, is a tool for tracking the work you are doing with clients. As with most tools, the more you know about how the system operates and the more you practice using it, the more effective it becomes.
Typically, anything new can be a little disconcerting at first, but with time, you will become proficient and comfortable with the tool. The goal of this class is to help you make the transition as smoothly as possible.

First, access the Internet and enter the web address: http://www.trackone-in.com/indywia/. This opens the website's log-on screen (see screen shot below on left); enter your password and click sign-in. This will open the next screen (screen shot below on the right) that asks you to choose which work group you want to open. Open the work group by clicking to select Indiana Workforce and then clicking "Sign–in." This will open the TrackOne home page (see the screen shot on the next page).





The home page has several key parts called "panes."

The top pane is a narrow band across the top of the page. It shows the software's name, the name of the individual signed in, the company logo for the software owner, and hyperlinks to "Help Topics," "About DSI (Data Solutions International)" and the "Logout" link.
NOTE: DSI developed the base application upon which TrackOne has been built.

The left side panel is the navigational panel. This panel has two tabs — each tab contains links to the various screens for operations and information in the system. The left hand tab takes you to the User Home page and the right tab takes you to the case management screens. We will be covering these links in detail on the following pages.

The center pane is the information and work screen for TrackOne. Let us start with the User's Home tab first.

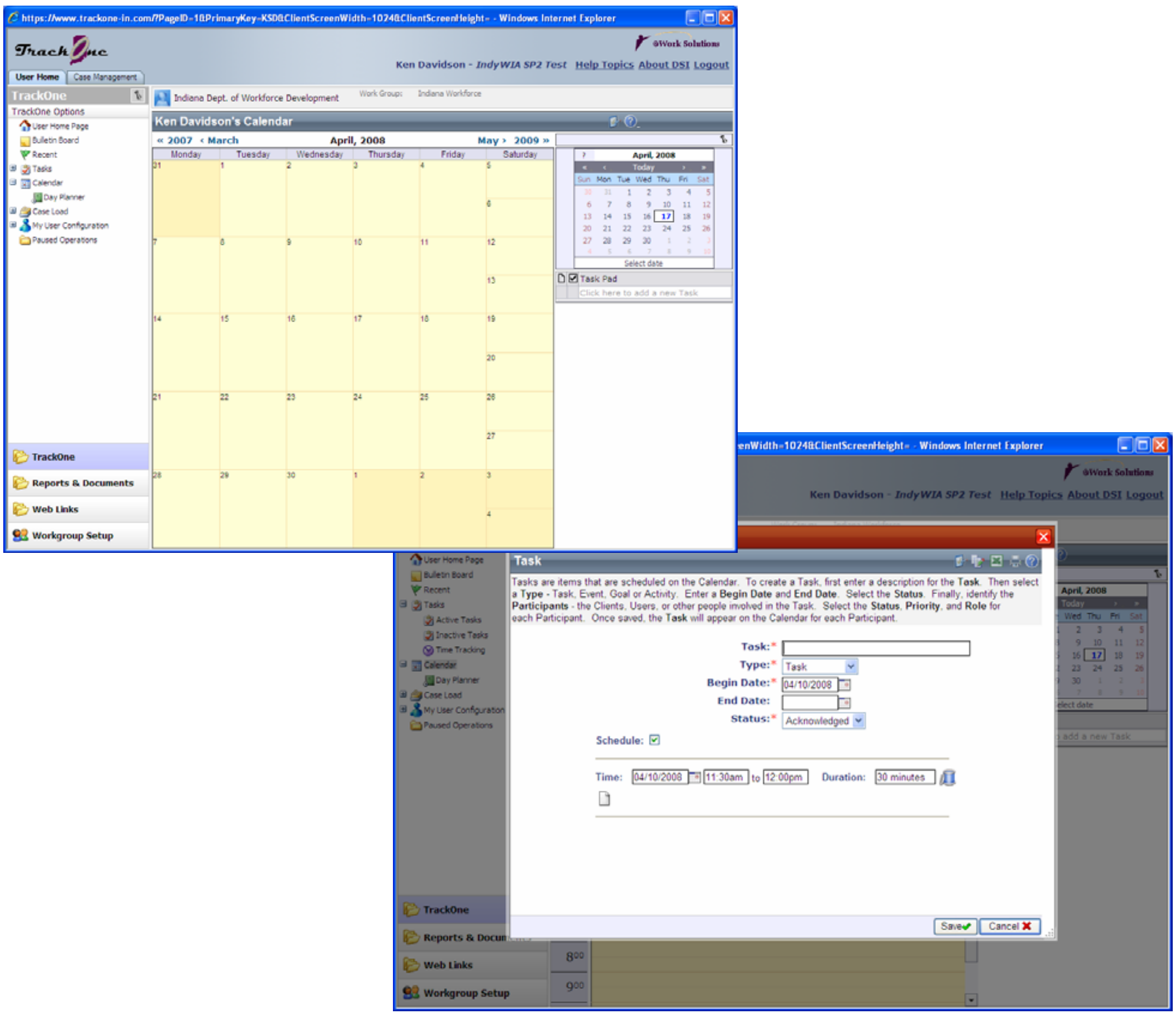
Calendar

TrackOne has a calendar that is very similar to your Outlook calendar. The calendar has two different views, "Monthly" and "Daily."

Below is an example of the monthly version.

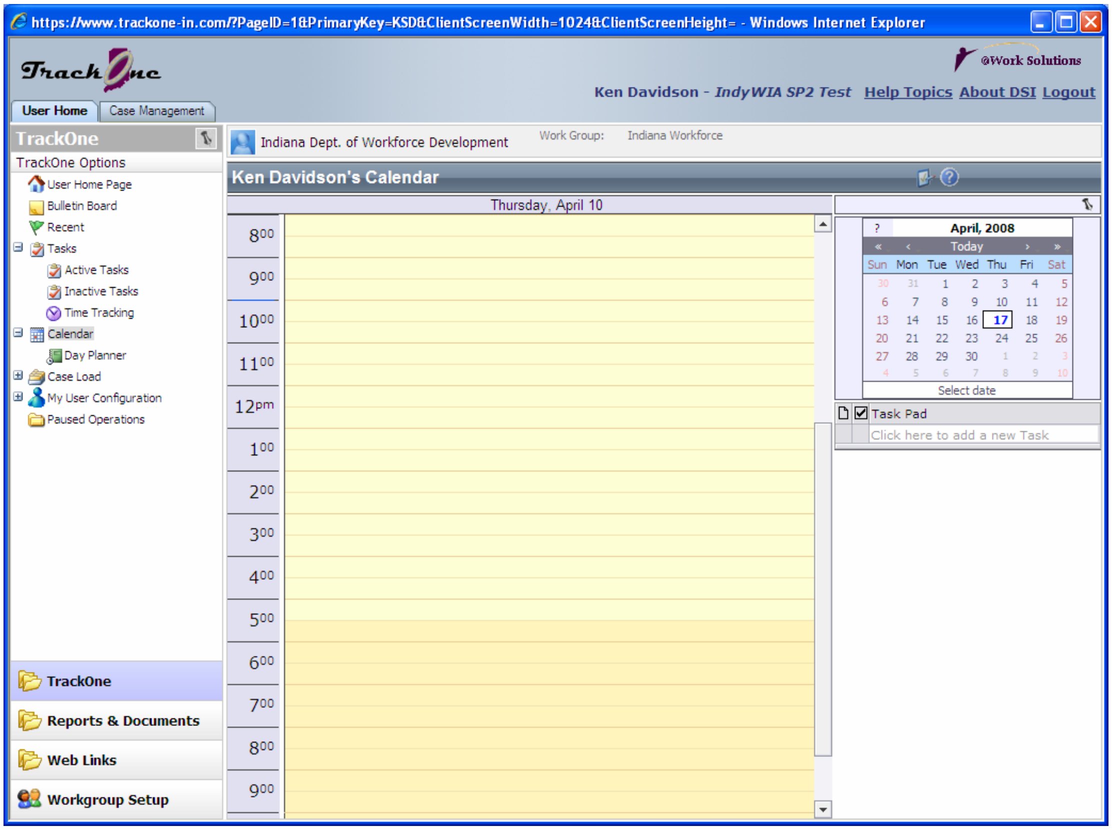
To add an appointment or important event to your calendar, click on the day that you need a reminder, and a dialogue box will open.

Describe the reminder or task in the boxes and identify a date that it is to be completed. If it has already been completed, fill in the completed date, any other appropriate information, and select **Save.**



The daily view can be used like a day timer to help with time management.

You can enter appointments, tasks, etc. It works similarly to an Outlook calendar. Instead of clicking on the calendar as you did in the monthly view, you click into the text box under the label **Task Pad**. It is on the right side of the screen towards the top. If you enter a participant's task, it will appear as a reminder on your calendar, and it will show on the client's file as well.



Reports

TrackOne has a multitude of reports that can be generated. There are many that are available within the program on the **User Home** tab. These are referred to as “canned” reports. Additionally, master users can access the raw data in order to create a variety of ad hoc reports.

Reports can be generated at the following levels:

- Statewide
- Region
- Site
- Case Manager

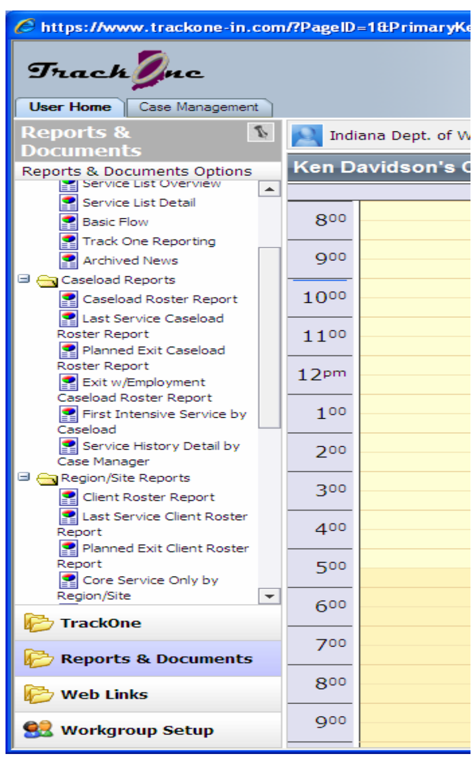
Details about the TrackOne reports are located on the DWD TrackOne website through the following link:

http://www.in.gov/dwd/partners/TrackOne/to_TrackOneReportsDefined.pdf.

The manual, entitled “TrackOne Reports Defined,” gives specific information on the uses of the canned reports and how to generate them.

The following screen shot shows the available “canned” caseload reports contained within TrackOne. Specific details regarding the use of each of these reports are contained in the “TrackOne Reports Defined” manual.

Please note that many of the canned reports in TrackOne are multi-functional.



Web Links

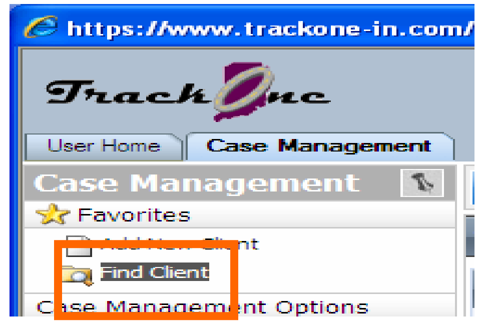
The last section of the navigation pane that we will look at is called "Web Links."
These are actual hyperlinks that take you to important resources needed for case management:

- DWD: This is the DWD website, which has valuable links for clients and staff.
- CS3: This is the Internet version of DWD's Job Search and Match system.
- Selective Service Registration: Even though there has not been a draft for many years, males between the ages of 18 and 25 or males born after 12/31/1959 must register with the Selective Service. The client can register online from this site.
- Selective Service Verification: This is a website for verifying that male participants between the ages of 18-25 or males born after 12/31/1959 are registered with Selective Service.
- The U.S. Department of Labor's ETA: Contains helpful resources, updates and WIA program information.
- DWD's O*Net Database: Access to the O*Net system allows for looking up O*Net Occupational Codes and is also an excellent labor market and career exploration link.
- TrackOne Tech Guidance/Resources: This is a web page within the DWD website. It provides links to technical notices, policy and procedural notices, training materials and more.

Several web links are posted on the **User Home** tab within TrackOne. These web links allow the user to access information easily from within TrackOne.

Finding a Client

The **Find Client** button is the second link you will see at the top of the **Case Management** tab navigation pane. You will want to attempt to find your client by Social Security number, last name, first name or birth date. A Social Security number should give you a unique result, but the other choices may generate a list of clients. You need to verify that you are selecting the right person.



TIP: It is best to keep your search as broad as possible. TrackOne searches for a record that exactly matches what you type in to the search window. Many people use different abbreviations, spacing and punctuation which can impact your search.

When first meeting with a client, you want to determine if they already have a client record in TrackOne.

Procedure

Click the **Case Management** tab.

1. At the top of the TrackOne Navigation Panel, click the **Find Client** link.
2. Type in any identifying information, such as **Last Name**, **First Name,** or **Social Security number**.
    a. **Important!** Searching by last name has led case managers to select the wrong client file. Searching by social security number is the best way, but if you must search by last name, be sure you check the social security number to ensure it matches.
3. Click the **Search** button. If you do not enter any information in the search screen and click on **Search**, you will get a list of all clients.

Important! If you haven't searched for an existing client record, you must do so before adding a new client. We are only skipping this step for the purposes of our training exercises.

Important! With the client file located, review the participant's information. If there is any more information beyond what was initially captured (at a minimum, the required five fields will have been filled in), you'll want to collect it now.

Impact on Common Measures

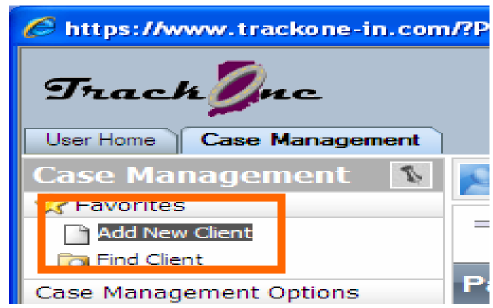
A client's SSN is still run against UI to gather the wage information prior to the common participation date. A client's SSN is run against UI to determine "Entered Employment", wages post program to calculate the average earnings and to determine employment retention. A client will be in the common measures performance calculations (entered employment, employment retention, and average earnings.)

Add New Client

At the top of the **Case Management** tab are two links. The screen pictured below will open when you click the **Add New** link. We will be getting in to applications in depth when we discuss the **Enrollment and Application** link.

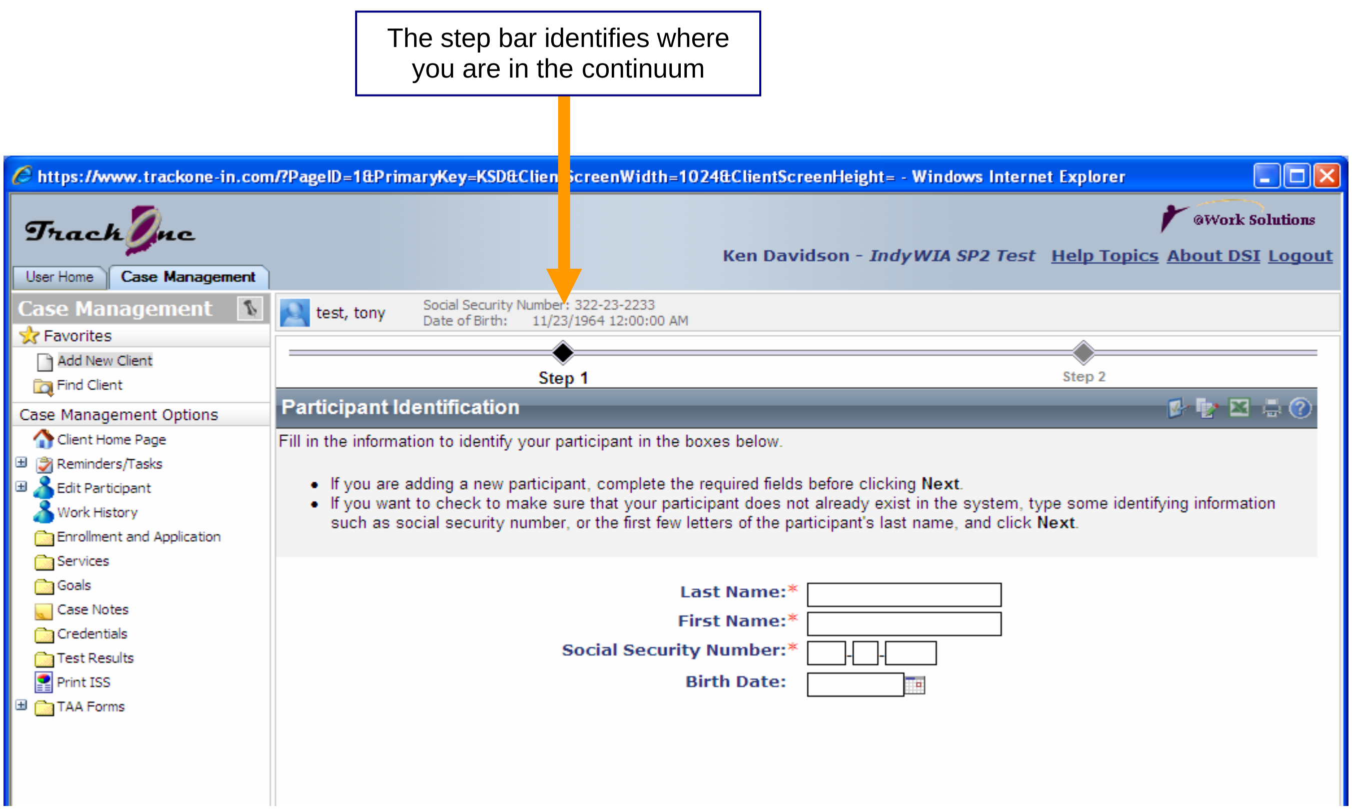
NOTE: Before inputting a participant as new, you need to make sure the participant is not already in the system by double checking the social security number.

Once you have verified that your client is not in the system, click the **Add New** button.

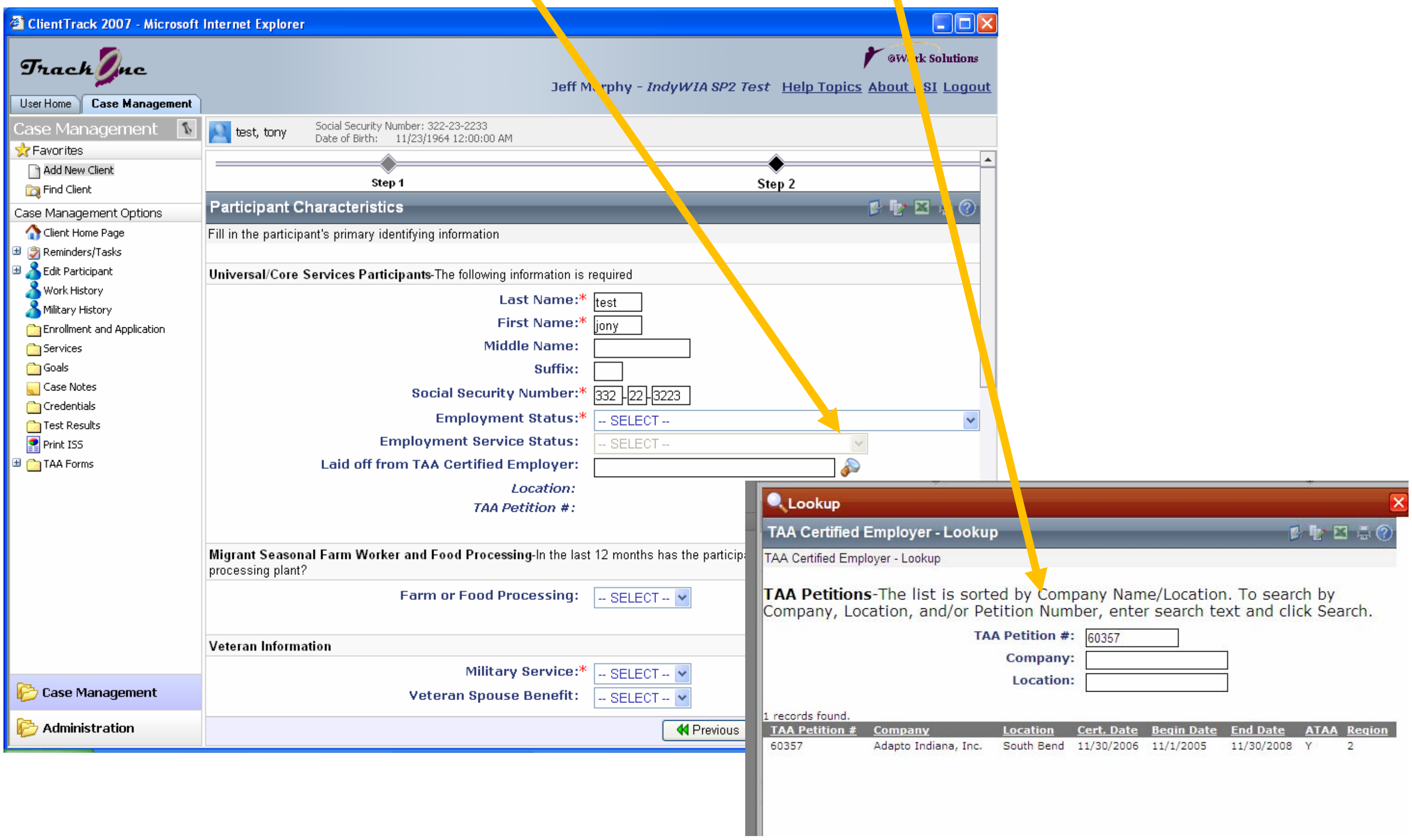


TIP: Notice the top of the screen. There is an indicator that shows the number of steps in this process and the current step. These bubbles tell you where you are in a multi-step/screen function.

Enter the **Participant Identification** information and click the **Next** button.



Most of the items are self-explanatory so now you will simply fill in the fields. The fields marked by a red asterisk are required. We are going to look at fields with drop down boxes or search boxes or a list to choose the appropriate data. When you reach **Laid off from TAA Certified Employer**, click the magnifying glass. This will open a search dialogue box.



NOTE:

Impact on Common Measures

While it is always best to capture as much information about the client as early as possible, you are only required to capture 10 basic demographic data (first name, last name, SSN, veteran's status, employment status, birth date, race, ethnicity, gender and disability status) before entering a core service.

NOTE:
If you need to edit any information that you have entered on these screens at a later date, use the **Edit Participant** link.

Procedure Review

1. Click on **Add New Client** at the top of the TrackOne Navigation Panel.
2. Click **Next.**
3. Enter the following required fields (flagged with a * red asterisk)
   - Last Name.
   - First Name.
   - Social Security Number.
   - Date of Birth
4. Click the **Next** button. Enter the final two required fields:
   - Employment Status
   - Veteran Status (If your client is a veteran, TrackOne will apply conditional logic and require additional information.)
5. Click **Finished**.

> Think of adding a new client as creating a new file folder for your client, one where all the information regarding him/her is stored. You only need one!

Work History

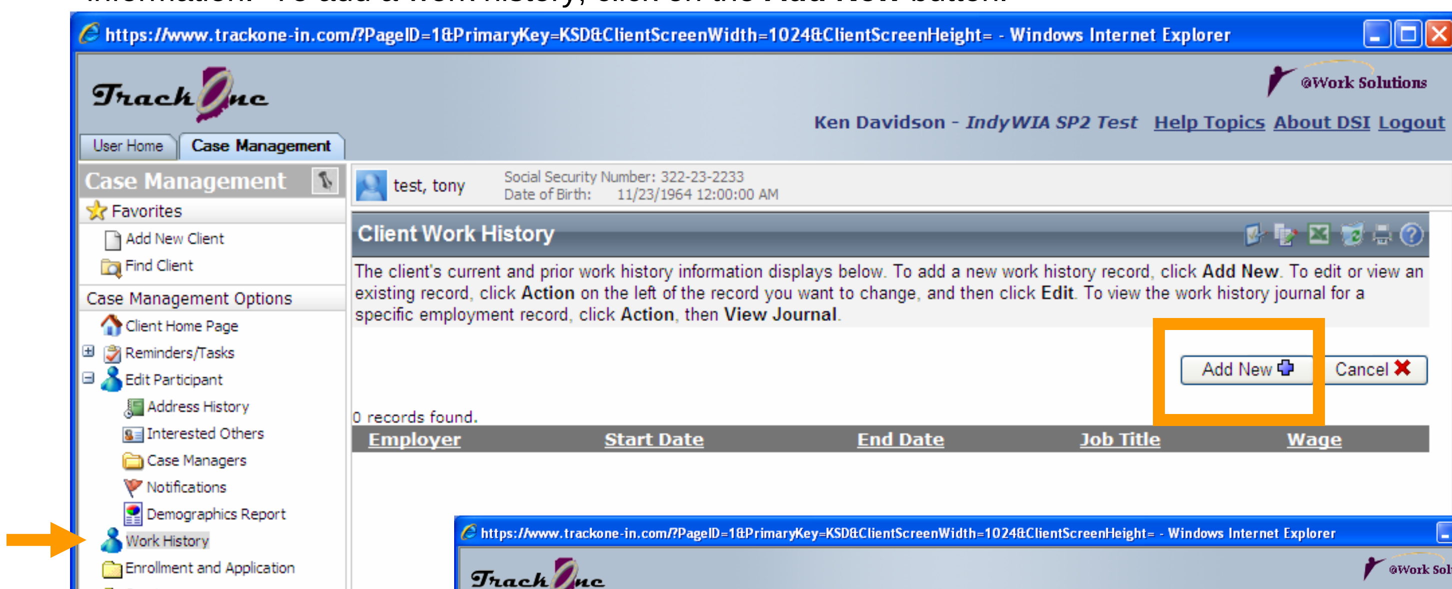
As with CS3, a complete and accurate work history is critical to successfully working with your client. It allows you to get a glimpse of their skills and experience, and may yield insight into potential barriers to future employment.

Completing the work history screens at this stage will allow information to carry over in to the application screens should you need to complete them. ***Therefore, it is recommended that case managers complete the work history screens prior to the application screens to save time during the application stage.***

Recording a work history has two parts:

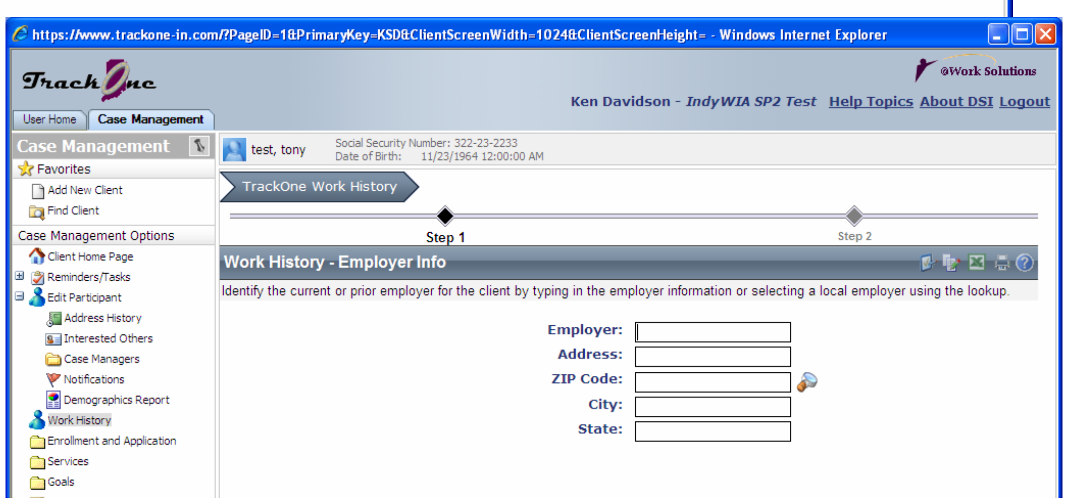
1. Adding employer information, and
2. Recording job Information.

Work history records are located in the **Work History** folder. Click on the folder in the left-hand menu to display the **Client Work History** screen. This client does not have any existing work information. To add a work history, click on the **Add New** button.



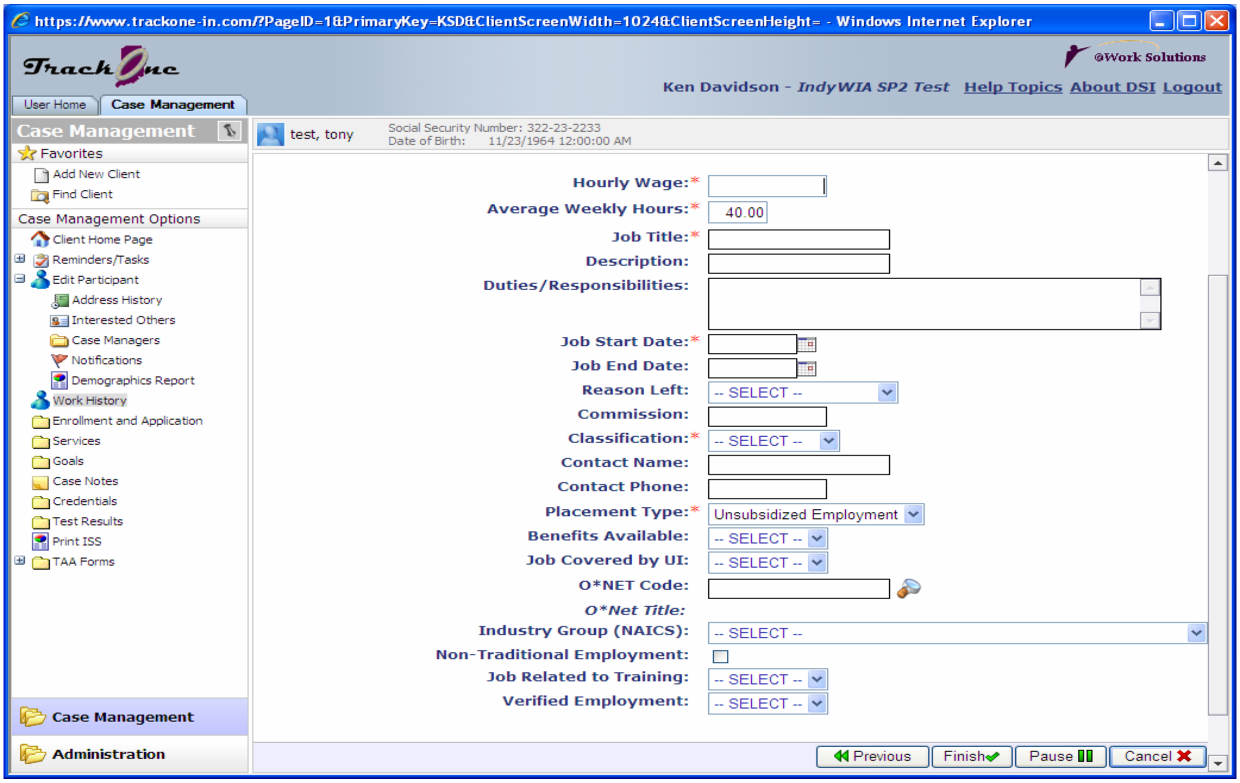
Step 1 of 2 - Add New Employer

1. Enter the employer name. This is a required field
2. Enter the address if known.
3. Click the **Next** button.



Step 2 of 2 – Job Information

Once the employer information has been entered, the next step is to record the specific job information for the client. Complete as many of the fields as possible.

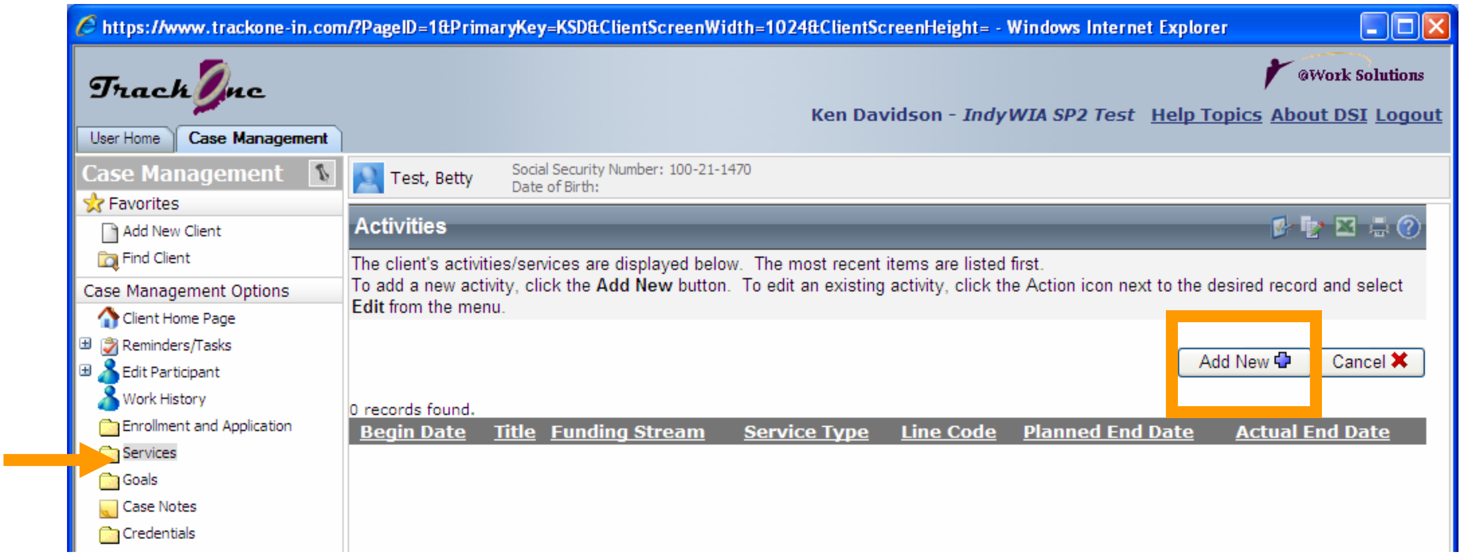


Quick procedures from start to finish

1. Enter the following required fields:
   - Hourly wage the client is currently receiving or was making at the time they left this job.
   - Average Weekly Hours
   - Job Start Date.
   - Classification
   - Placement Type
2. Complete other, non-required fields, if the information is available.
3. Click **Finish** button.

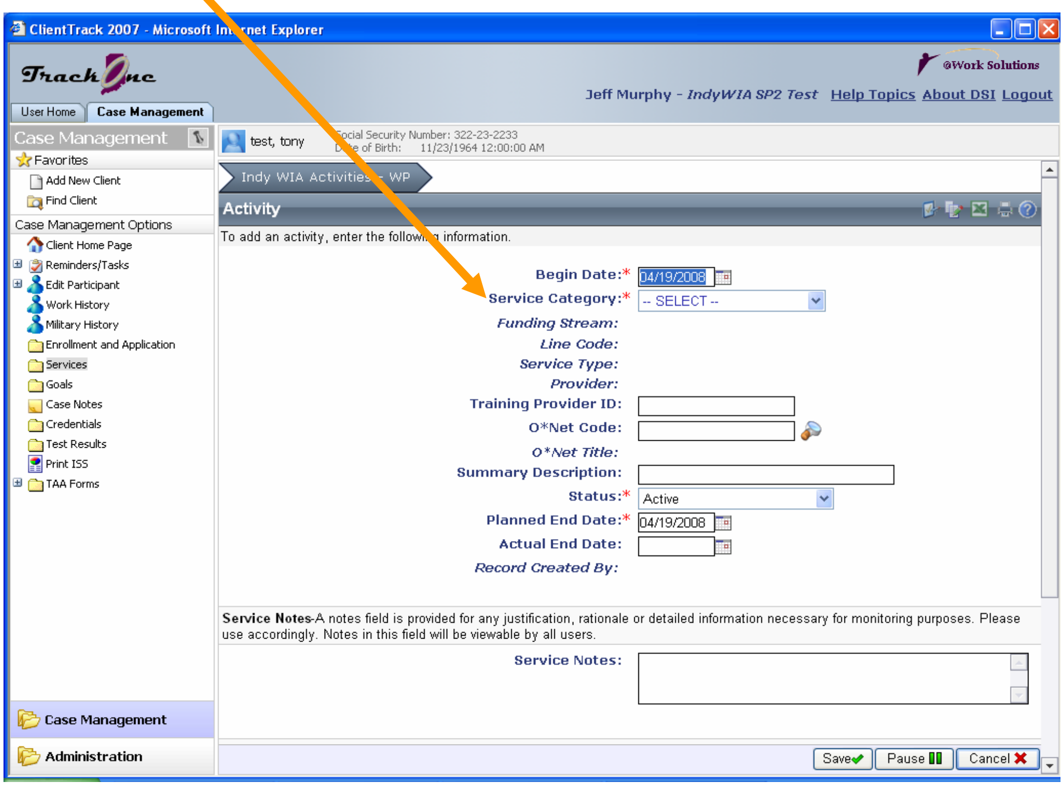
Add 1st Core Service

Once you have entered your client's primary information, you need to record the fact that you have provided, or the client received, a core service.   To add and view a client's service history go to the services screen. On the navigation pane, click the **Services** folder. That will open the **Services** pane. Click the **Add New** button to open the activities / services screen.



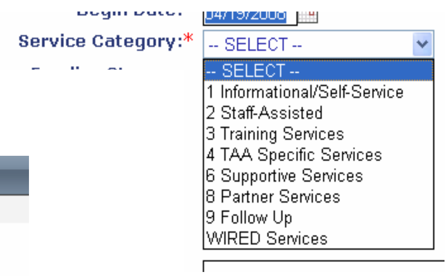
This will bring up the activity detail screen. Today's date defaults in the **Begin Date**. (TrackOne will only allow the general user to back date a service no more than 3 business days.)

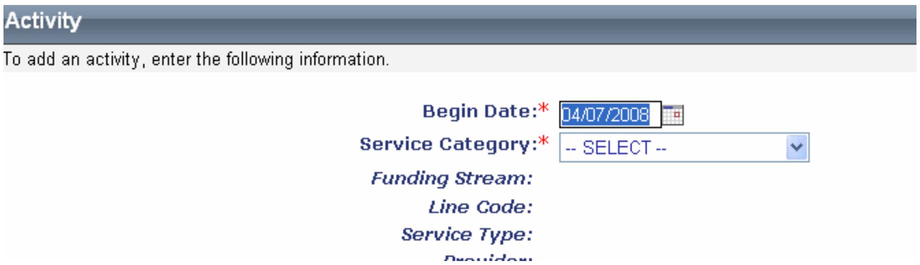
Click on "Service Category" to narrow the search.



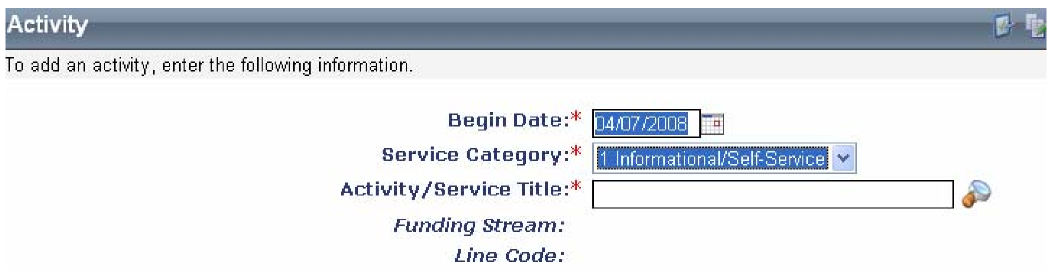
The "**Service Category**" choices are shown on the right.

Since this is the 1st Core Service select "1 Informational / Self-Service."





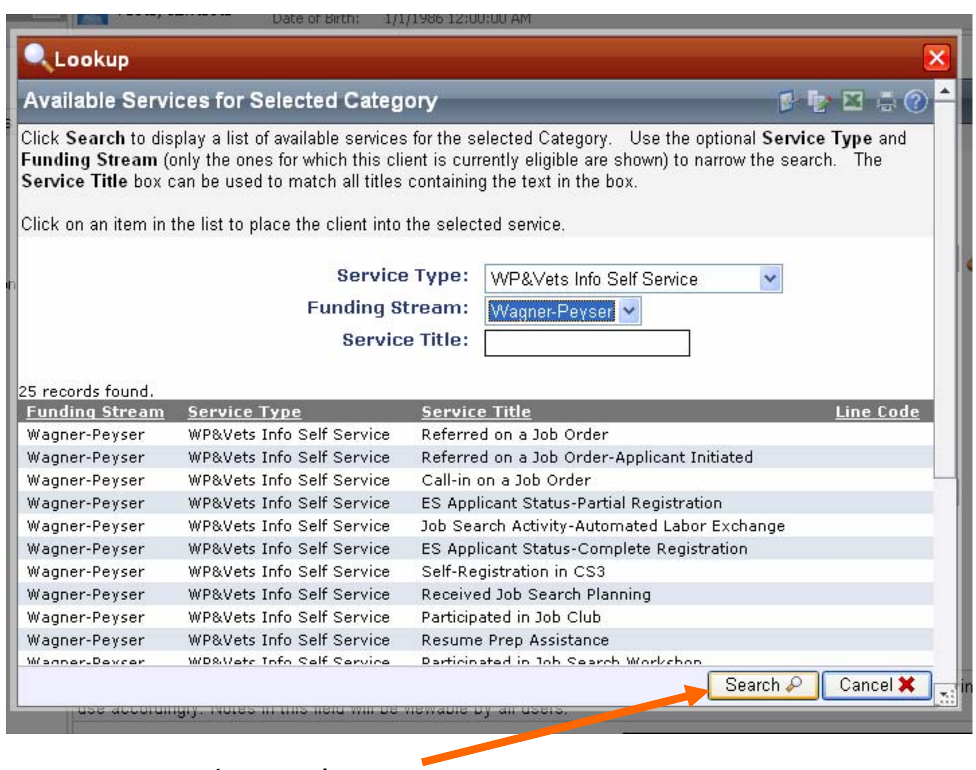
Once a selection is made the "**Activity/Service Title**" field will appear.



Click on the Magnifying glass to open the Lookup window. The Lookup window will appear.

Three choices are available to narrow the search:

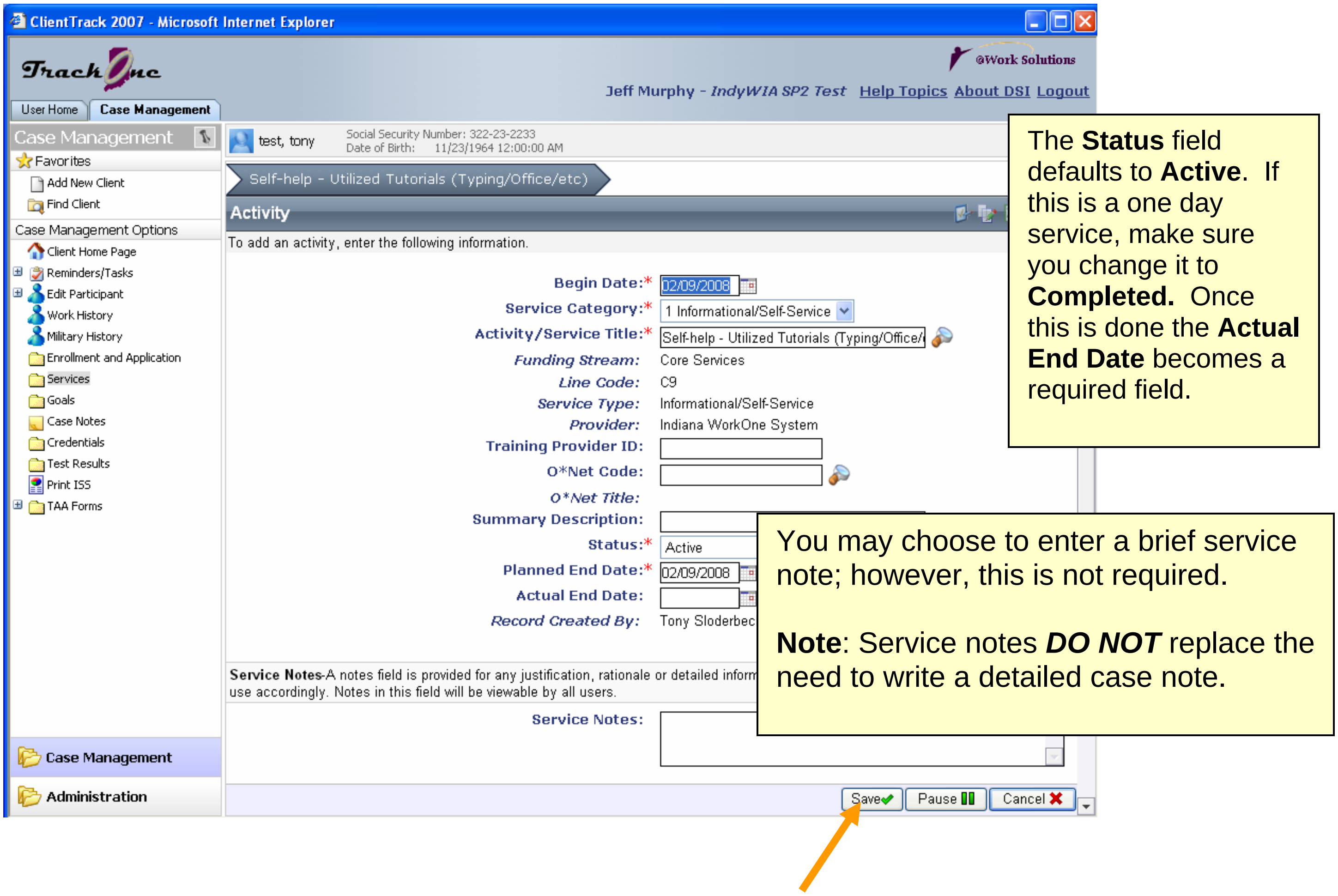
- **Service Type** pick list is driven by the previous Service Category.
- **Funding Stream** field is dependent on the participant's eligibility. Since this client does not have a completed application (which identifies program eligibility), the client is only eligible for a few selected funding streams.
- **Service Title** allows user to type in a specific title if known.



Click the Search button at the bottom to return the results.

Click on the desired service title once and this returns you to the service/activity detail screen.

Activity / Service Detail screen.



Once all fields with a red asterisk have been completed and actual end dates and services have been completed, as appropriate, click Save.

Quick procedure from start to finish

1. Click **Services** on the TrackOne navigation panel.
2. Click **Add New** on the data entry screen.
3. Enter the begin date.

   Note: Begin date, planned end date, and actual end date should all be the current date.
4. Select a Service Category.
5. Search the available service/activity title by clicking on the **Magnifying Glass** to launch the search function.
6. Enter Service Type by using the drop-down menu.
7. Enter a Funding Stream.
8. Click **Search** to launch the search function.

9. Select the service and provider from the generated list. This will auto-fill the service/activity title, category, line code, service type and provider on the activity screen.
10. Enter service notes.
11. Click **Save.**

Adding the **Core Self Service**:

- Establishes **common participation** date.
- Creates a period of participation/enrollment record, ***if it is the first***.

Enrollments & Applications

Application Overview – How to Read the Enrollment and Application Summary Screen

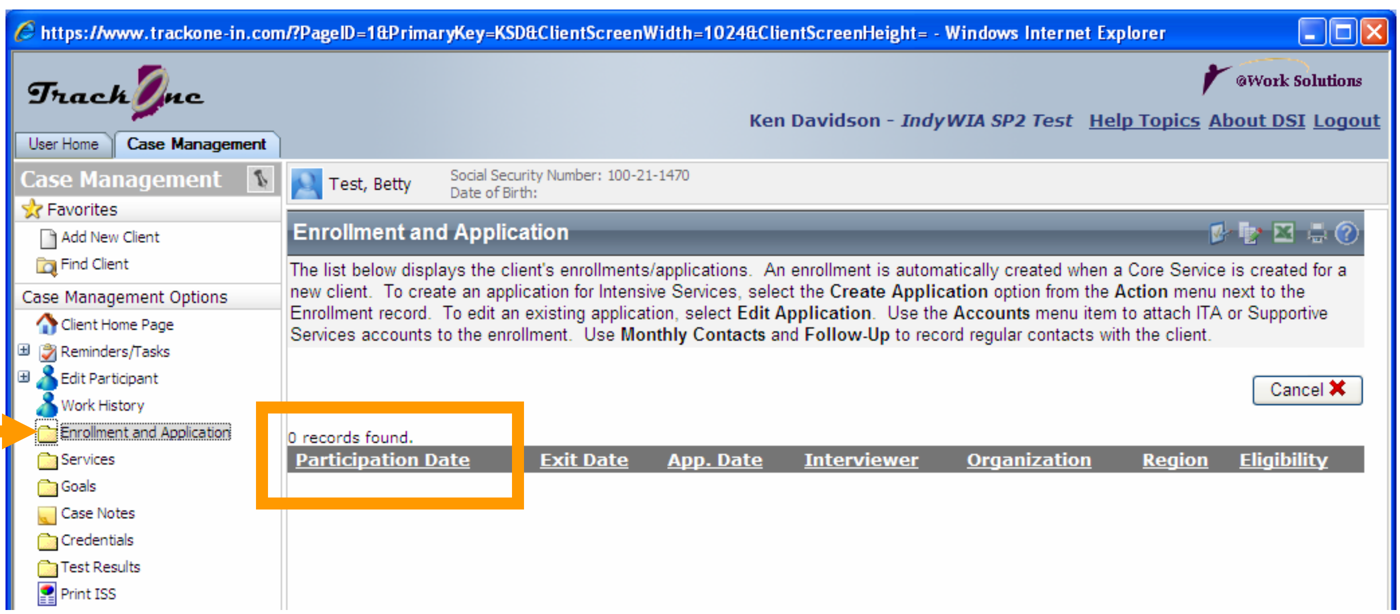
The following section will give a quick overview of how to read the **Enrollment and Application** summary screen.

Every client that receives a service in TrackOne will have a period of participation. A period of participation (POP) is the time that a client spends enrolled in TrackOne. A client's POP begins when their first core service is entered and ends on the last date of service.

No Period of Participation

When a participant is first entered into TrackOne and no services have been recorded, then there is no period of participation. The **Enrollment and Application** summary screen is blank.

Here is a screenshot of a participant without an enrollment/POP. Since there is no period of participation, TrackOne is not giving you the option to record an application.

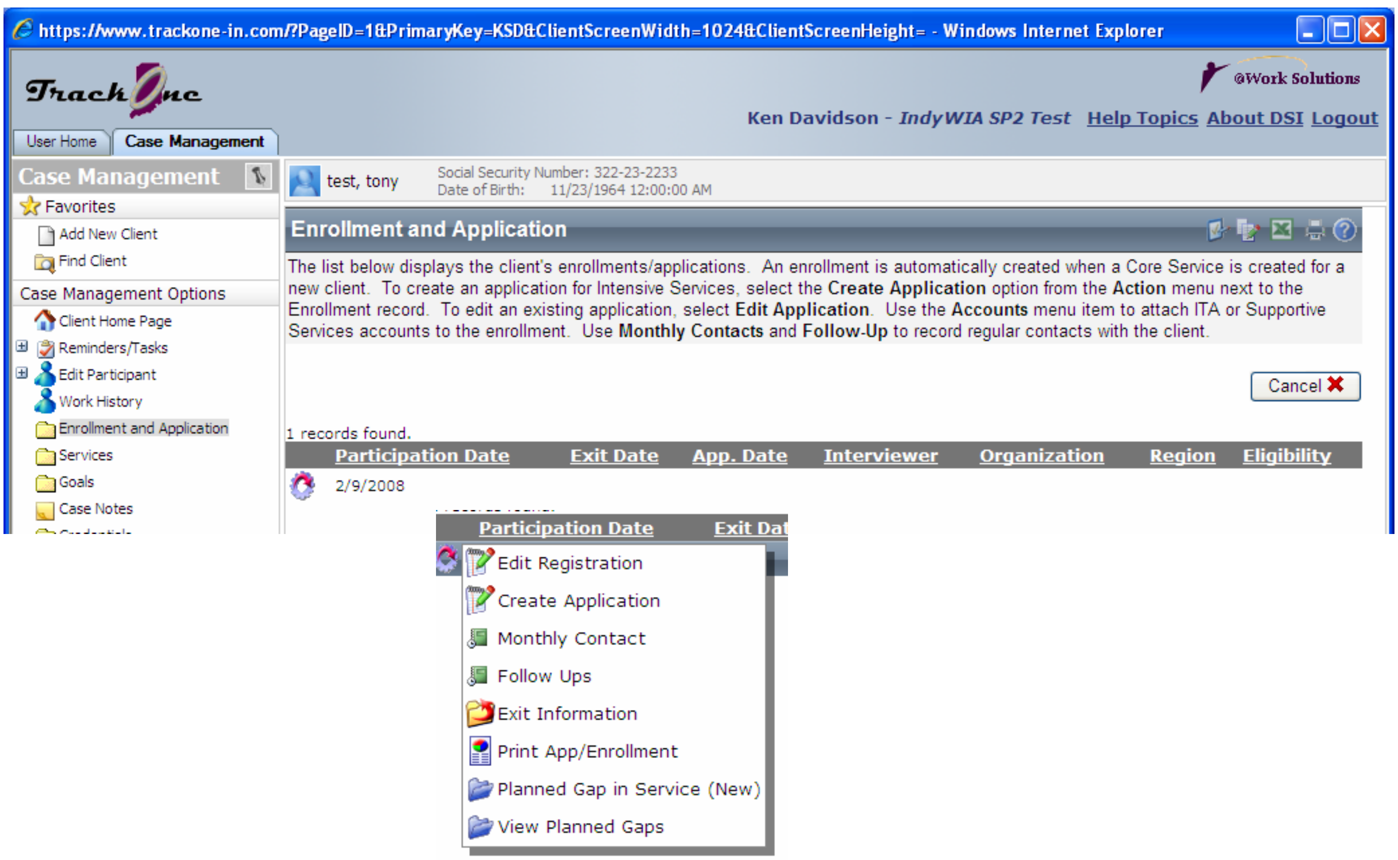


1st Core Service Initiates Participation / Starts a Period of Participation

Enrollments are based on receiving services. Similar to the period of participation, the enrollment begins when the first service is received and ends on the last date of service. Participants can be enrolled in common measures only, or, if there is an application present and intensive or staff assisted services, a program enrollment.

Here is an example of a participant who has a 1st core service recorded, but does not have an application.

Note: The screen now has a participation date appearing, but no other information. To the left of the enrollment is an action/gear icon. Note the choices on the gear icon. Since there is no application "Create Application" is a choice.

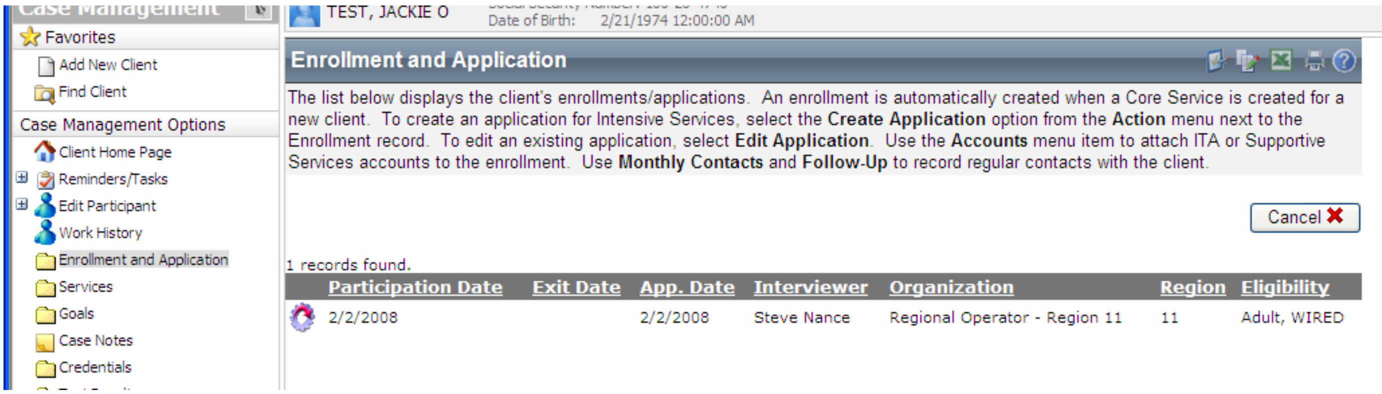


Enrollment with an Application

This participant now has an application.

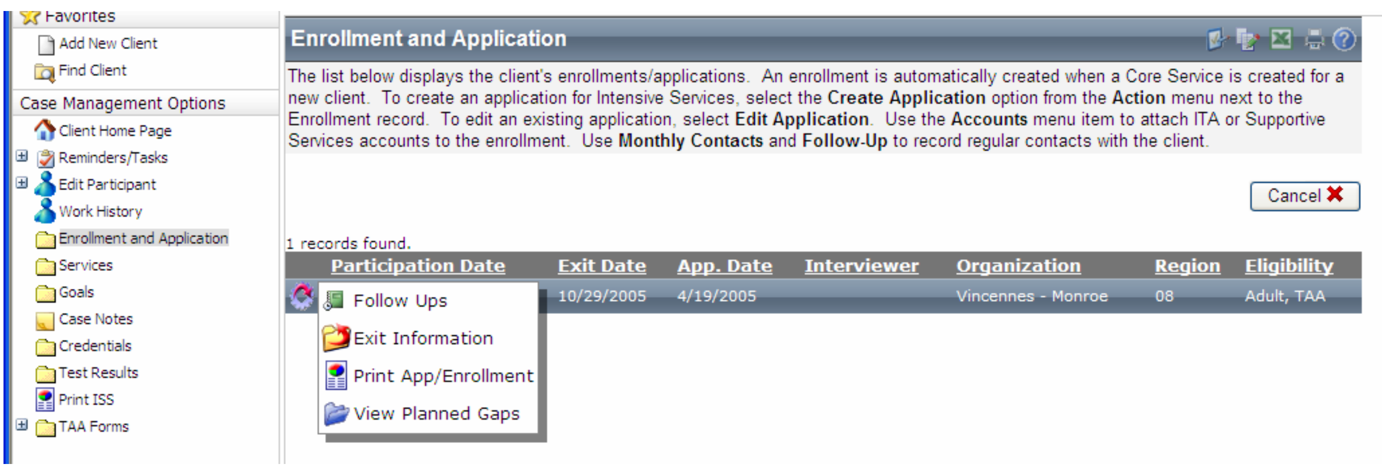
Note: The other information which appears on the screen--application date, intake site, interviewer, region, and eligibility.

Note: The programs listed under **Eligibility** are not necessarily the programs in which the client is enrolled. This is simply a list of the programs for which the client is eligible based on what is entered in the application. This will be explained in more detail in the application section.



Exited Participant

Once 90 days have passed with no participation, the participant is then exited. If that is the case then there will be an exit date on the **Enrollment and Application** screen. Note the difference on the action icon list--there is no longer the option to edit the application or add monthly contacts.



Multiple Enrollments

Participants may have more than one period of participation; this occurs when a client has already been exited from a program and later receives services. The screen shot below is an example of a participant with two periods of participation.

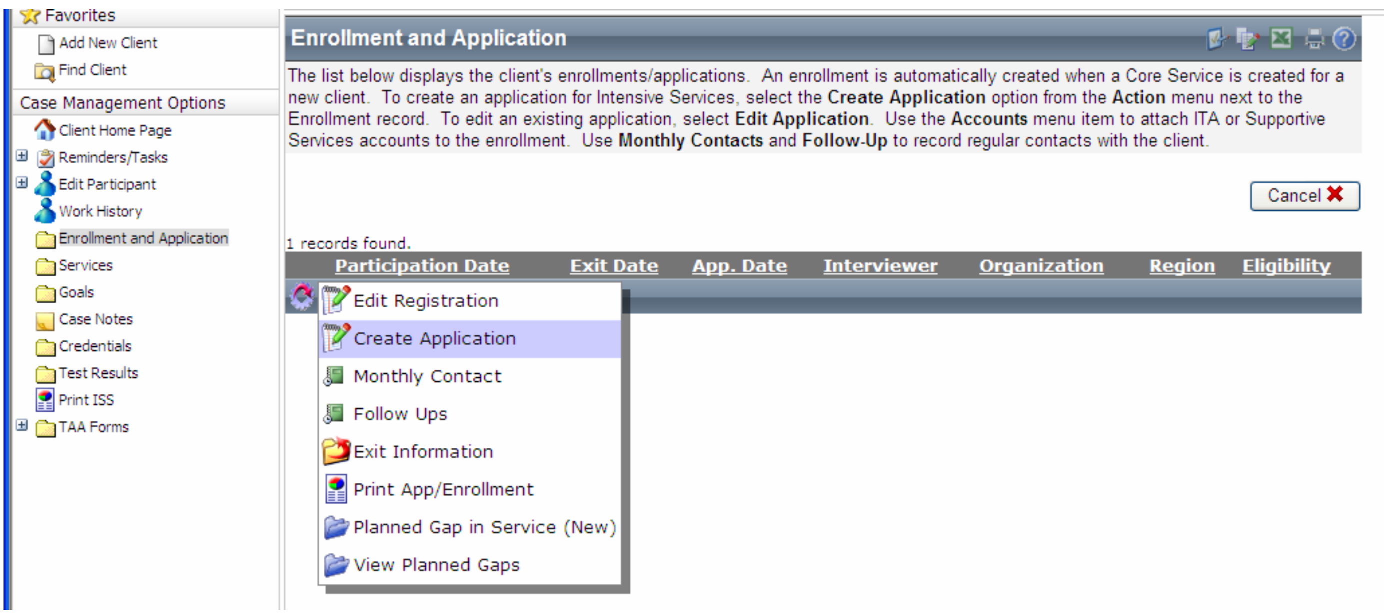
In this example, the client had already received services from 2/23/2006 to 8/8/2006 and was soft-exited. The client came back into the program in 2008 which requires a new enrollment and a new application.

Creating an Application

Once the 1st core service is present and a period of participation has been started, then an application can be created. It is located off the gear icon.

Up to now we have entered the minimum required information about our participant to be able to record a core service. The first core service has been entered and a period of participation has been created. The participant could stay as a core services-only client and there would not be a need for an application. However, if the participant needs further intensive services, then an application must be created before further services can be recorded.

In order to enter this service record, we need to complete an application for the participant. Click the **Enrollment/Application** link on the navigation pane. Click on the gear icon, which will open a drop down menu. Read the selections carefully. Since our participant is new, select the **Create Application** link.



There are five parts to the application process which we will outline step by step:

1.) Applicant Information

2.) Employment Information

3.) Other Client Information

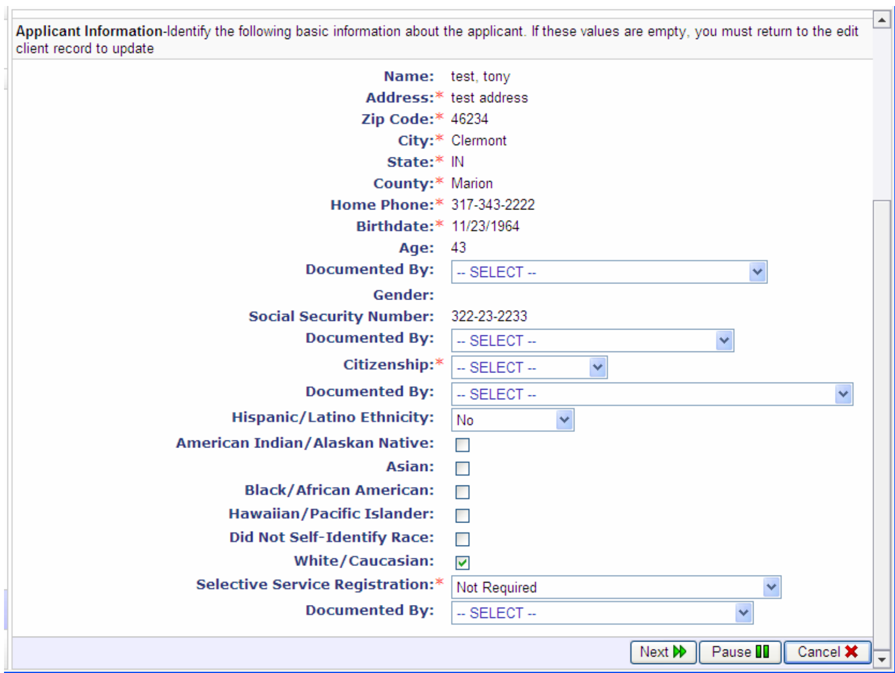
4.) Barriers

5.) Eligibility determination

Step 1 – Basic Client Info

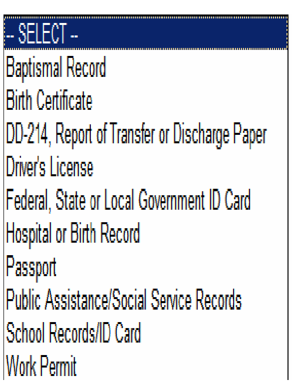
The first thing you will notice on the applicant information screen is the information that carried over from the **Add New Client** screens. You should complete as many of the fields as possible. These screens are designed to provide a formal eligibility determination; therefore, we will need our participants to provide documentation for some of the fields. Below the fields requiring documentation, you will notice a **Documented By** field. Notice the drop down list arrow at the right of the **Documented By** text box. Click on this arrow to see a list of acceptable documents and select the one that represents the documentation provided by the participant.

TIP: To ensure that clients have the required documentation on hand during the eligibility appointment, we suggest that the participant receive a handout describing the required documentation prior to the appointment.

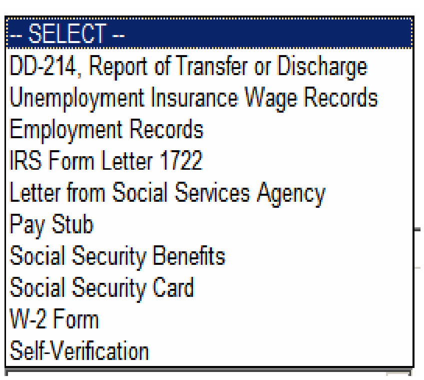


The fields that require documentation are:

Date of Birth

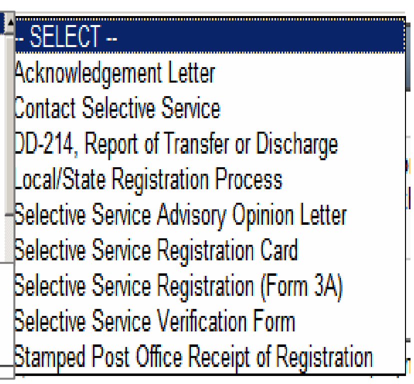


Social Security Number



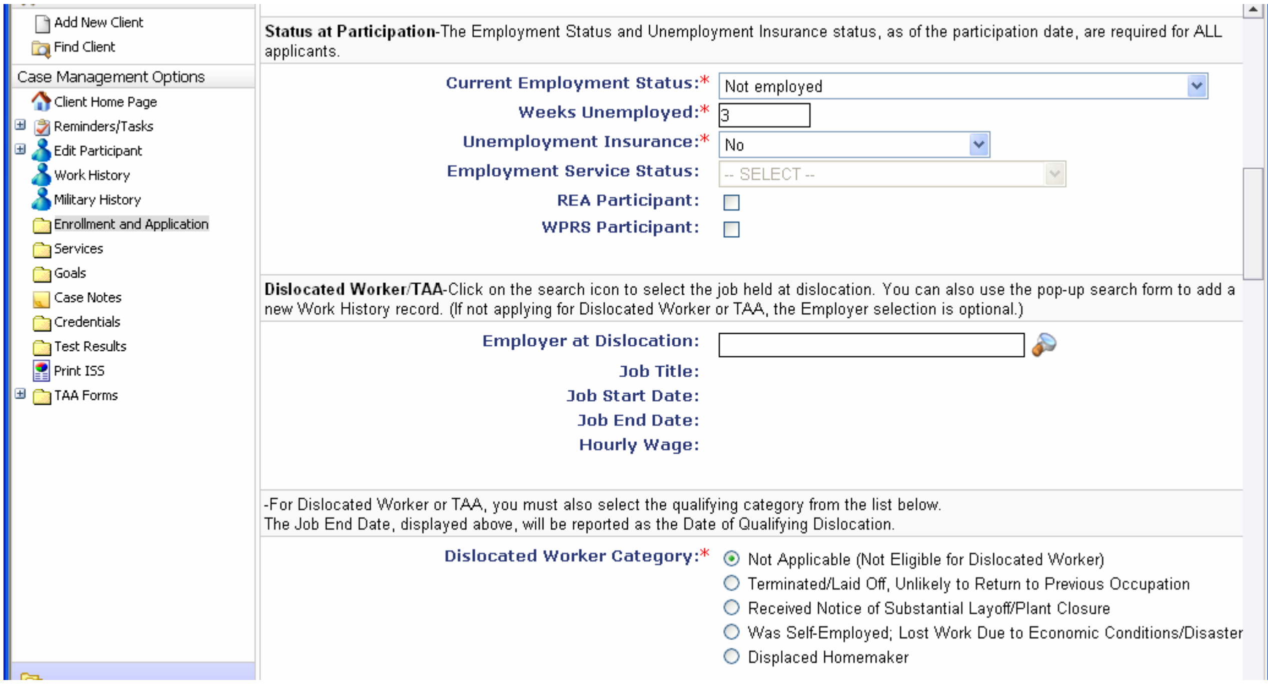
Citizenship

Selective Service

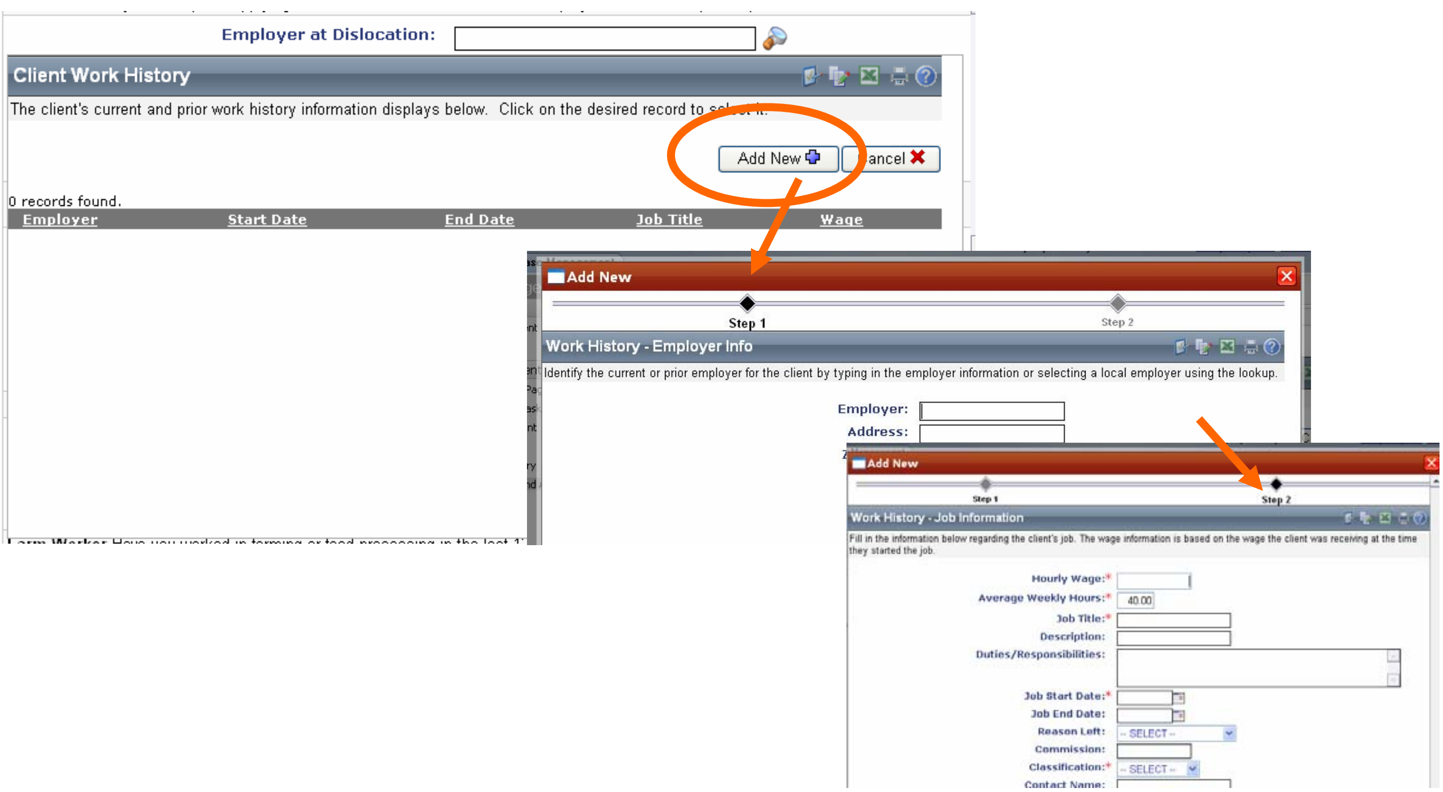


Step 2 – Employment Information

The next section of the application is the **Employment Information** section. This section is for completing the pertinent information about the participant's most recent job. If you have already completed the work history screens, the information will carry over.



TIP: It is important to keep the work history screens up to date. If you started the application without entering the work history you can add it by clicking on the magnifying glass. Client Work History window will open and the Add New button can be clicked.

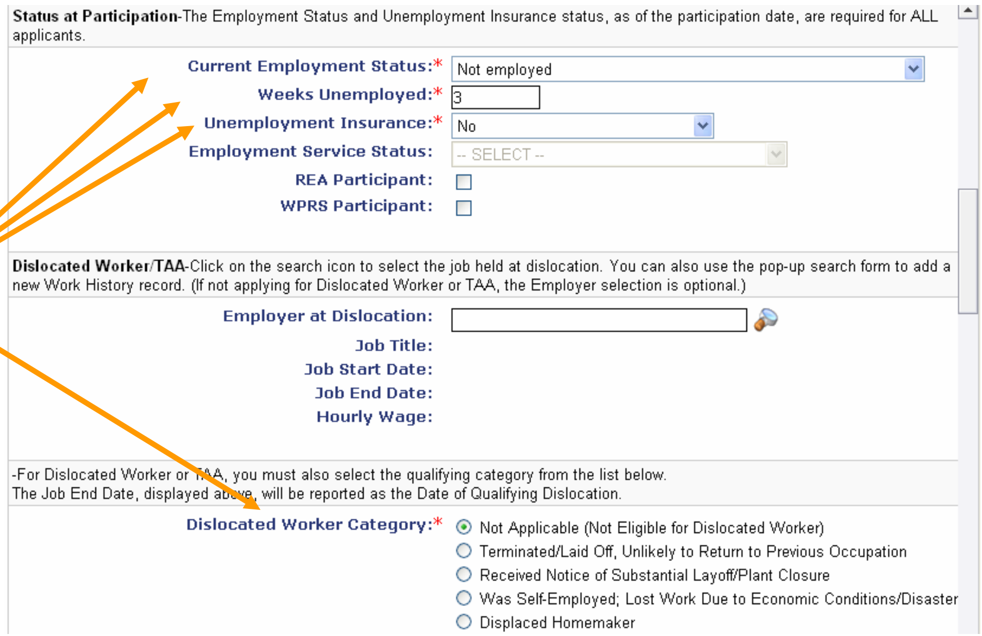


Dislocated Worker Category

If a **Dislocated Worker Category** is selected, than the application will require that certain fields must be filled out before you can continue with the application:

No Dislocated Worker Category Selected:

Note the fields that are originally required


Status at Participation-The Employment Status and Unemployment Insurance status, as of the participation date, are required for ALL applicants.

Current Employment Status:* Not employed
Weeks Unemployed:* 3
Unemployment Insurance:* No
Employment Service Status: -- SELECT --
REA Participant:
WPRS Participant:

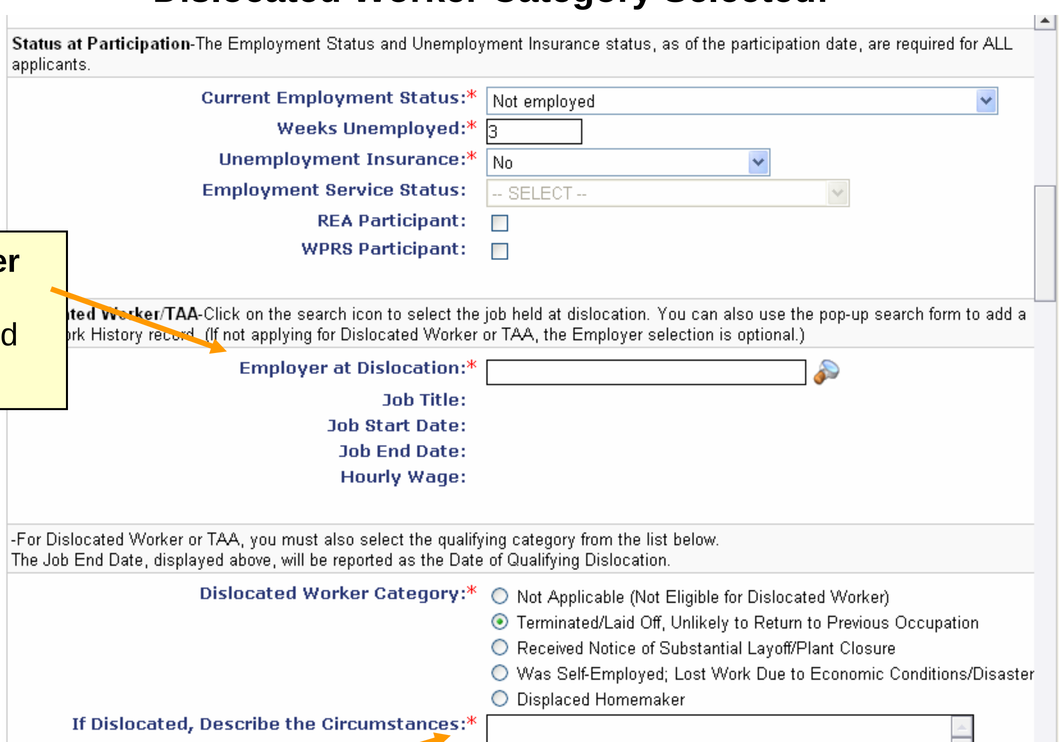
Dislocated Worker/TAA-Click on the search icon to select the job held at dislocation. You can also use the pop-up search form to add a new Work History record. (If not applying for Dislocated Worker or TAA, the Employer selection is optional.)

Employer at Dislocation:
Job Title:
Job Start Date:
Job End Date:
Hourly Wage:

-For Dislocated Worker or TAA, you must also select the qualifying category from the list below.
The Job End Date, displayed above, will be reported as the Date of Qualifying Dislocation.

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

Dislocated Worker Category Selected:


Status at Participation-The Employment Status and Unemployment Insurance status, as of the participation date, are required for ALL applicants.

Current Employment Status:* Not employed
Weeks Unemployed:* 3
Unemployment Insurance:* No
Employment Service Status: -- SELECT --
REA Participant:
WPRS Participant:

Dislocated Worker/TAA-Click on the search icon to select the job held at dislocation. You can also use the pop-up search form to add a new Work History record. (If not applying for Dislocated Worker or TAA, the Employer selection is optional.)

Employer at Dislocation:*
Job Title:
Job Start Date:
Job End Date:
Hourly Wage:

-For Dislocated Worker or TAA, you must also select the qualifying category from the list below.
The Job End Date, displayed above, will be reported as the Date of Qualifying Dislocation.

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

If Dislocated, Describe the Circumstances:*

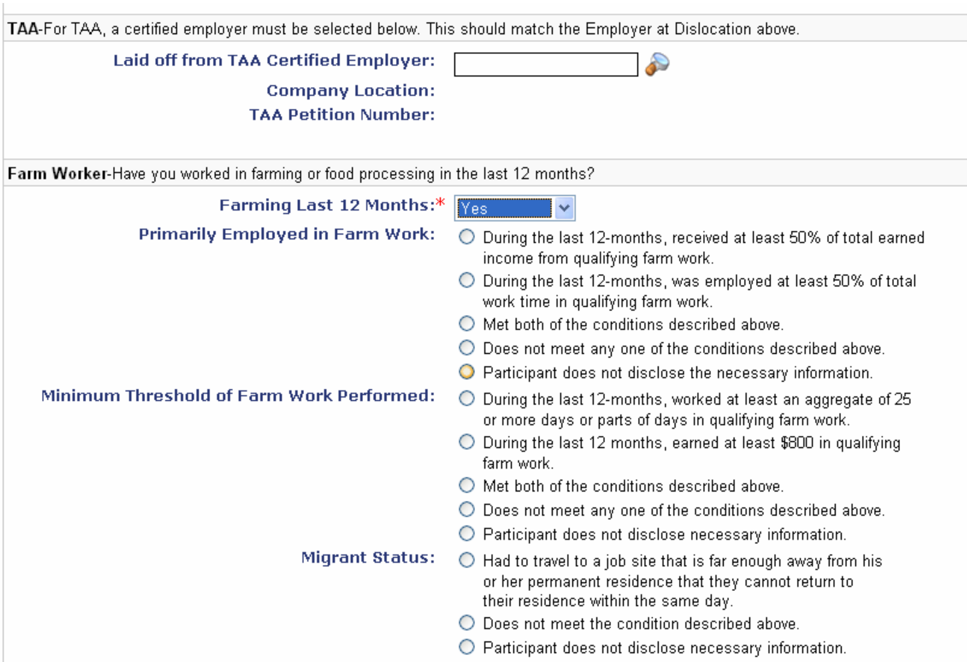
Note that **Employer at Dislocation** becomes a required field.

Also, now that a **Dislocated Worker Category** has been selected, there is a new field that appears that must be completed before continuing on with the application.

TAA Certified Employer & Farming Work

If the participant was recently laid-off from a TAA Certified Employer, then find the correct employer by using the magnifying glass.

The next section is the Farm Worker or Food Processing. If “Yes” is selected for the “Farming Last 12 Months” field, then additional questions appear.



Step 3 – Other Client Information

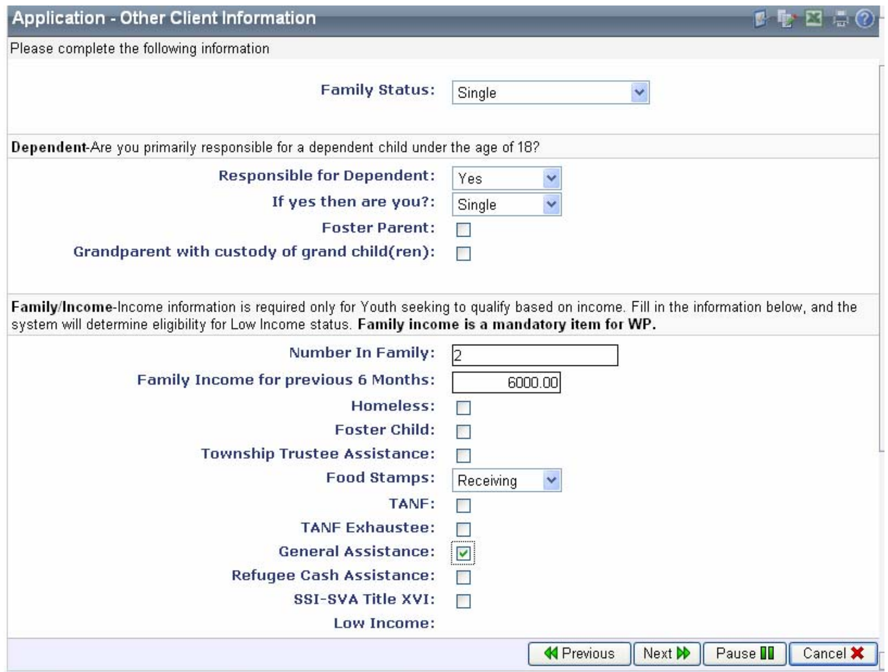
The next section of the application is **Other Client Information**. The concept of "no wrong door" is important in achieving premier customer service. While some of this information is not required by a particular program, it is information critical to our clients receiving all of the services they need to succeed. Our clients do not care about funding sources, nor should they. Therefore, it is expected that all staff make a concerted effort to capture information on behalf of other workforce development programs.

Low Income Status

The fields related to family status and income are necessary for those programs that require an income eligibility determination. It is important that this information is captured at the time of application.

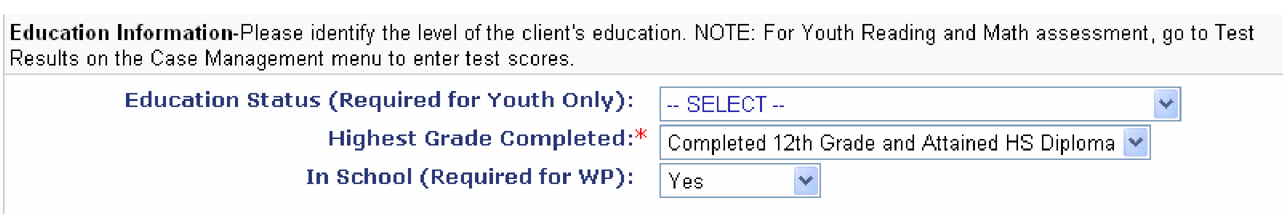
The system automatically annualizes the family income; therefore, it is important to only record the six (6) month income as required on the screen.

NOTE: The **Low Income** field is calculated and cannot be entered by the user.



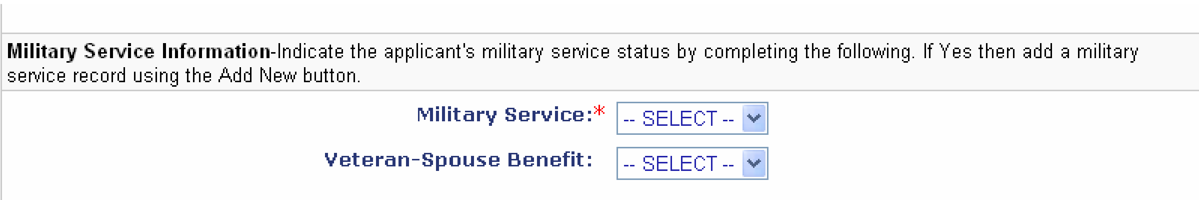
Education Status for Youth

The next section of **Other Information** is the education section. The **Education Status** field is for WIA youth. The **Highest Grade Completed** field is a mandatory item. Click the drop down list arrow and select the highest grade completed, not attended.



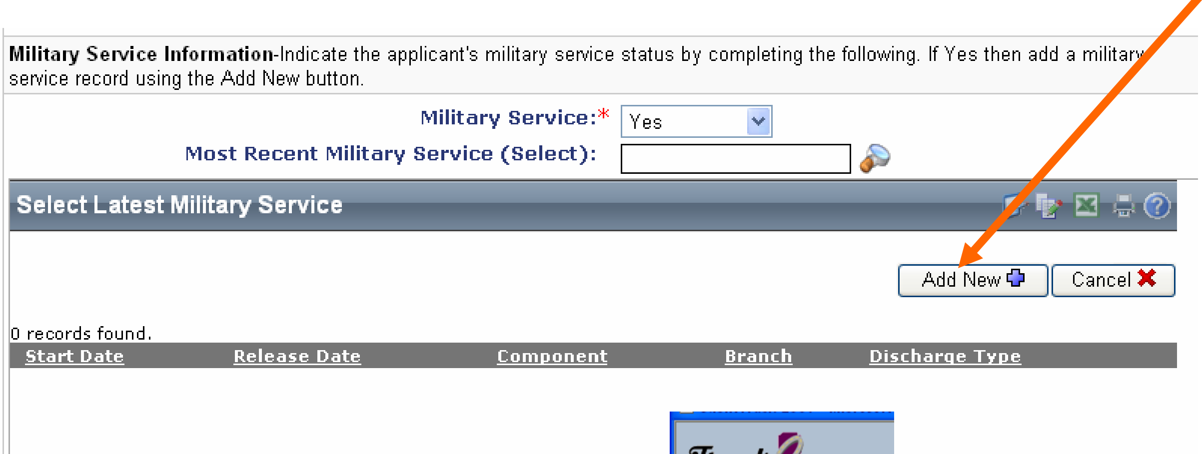
Military Service Information

The last section of **Other Client Information** is **Military Service**. Veterans preference is mandated for both the Wagner-Peyser and WIA programs. Collecting data on the veterans we serve is required and important. If the answer to Military Service is Yes, then additional fields are displayed.

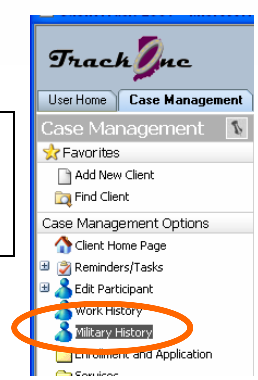


If Yes, then…

A Military service record must be created and attached to the application. Click on the magnifying glass to select an existing record or to add a new one. Once window appears click "Add New."

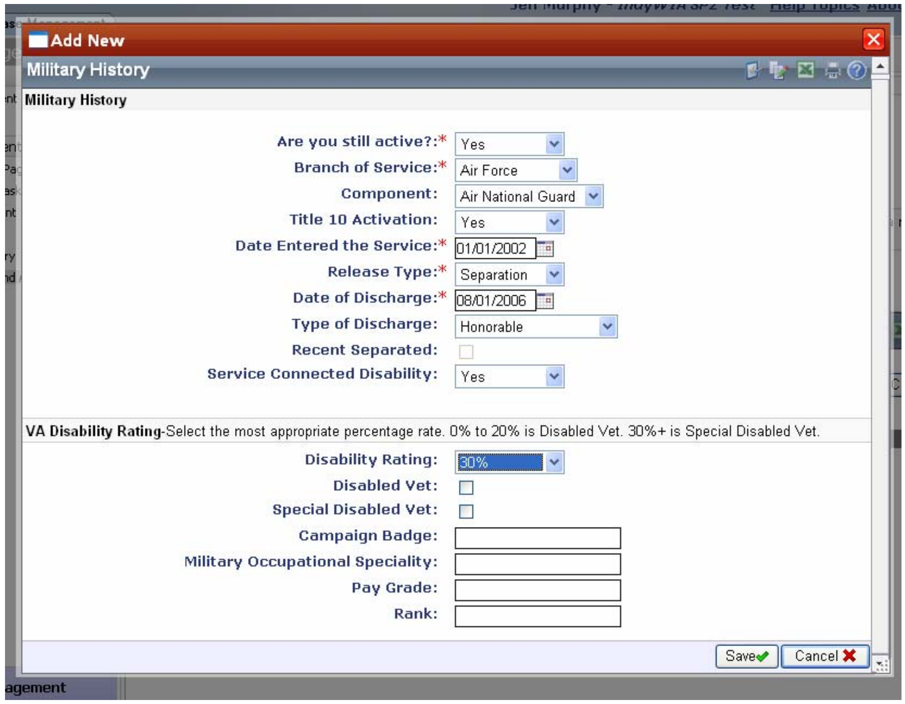


NOTE: The Military History records can be entered from the left-hand menu. A link is present below the Work History.

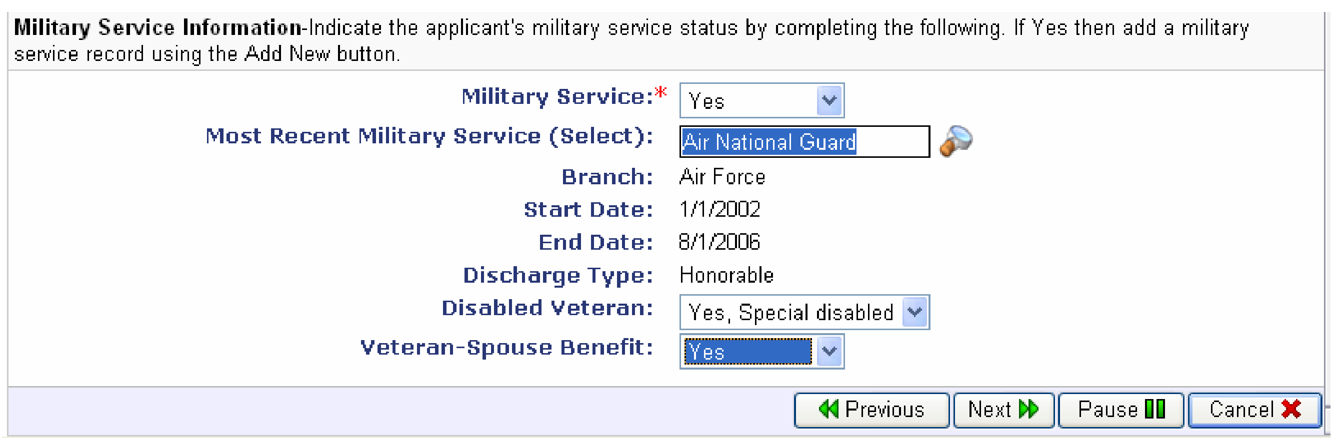


Military History Screen

The Military History screen will appear. Enter all information available. The screen allows the user to enter an current military service record if the participant is still active. It also allows the user to record past military service records.



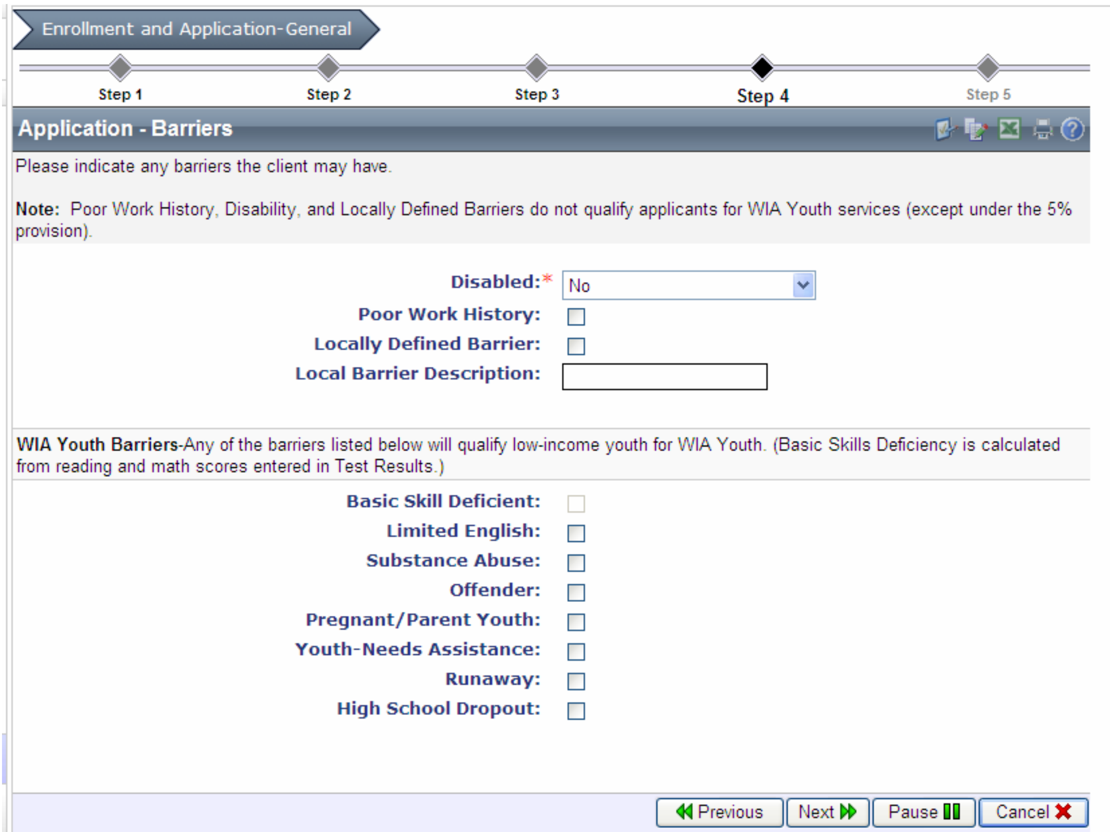
Once complete click on the Save button. This will return the application and with the military service information displayed.



NOTE: A disabled veteran has a VA (Veterans Administration) rated disability. Disabilities are rated in percent ages ranging from 0% to 100% and are granted in increments of 10%. A special disabled veteran has a rating of 30% or higher. Select the appropriate item from the list.

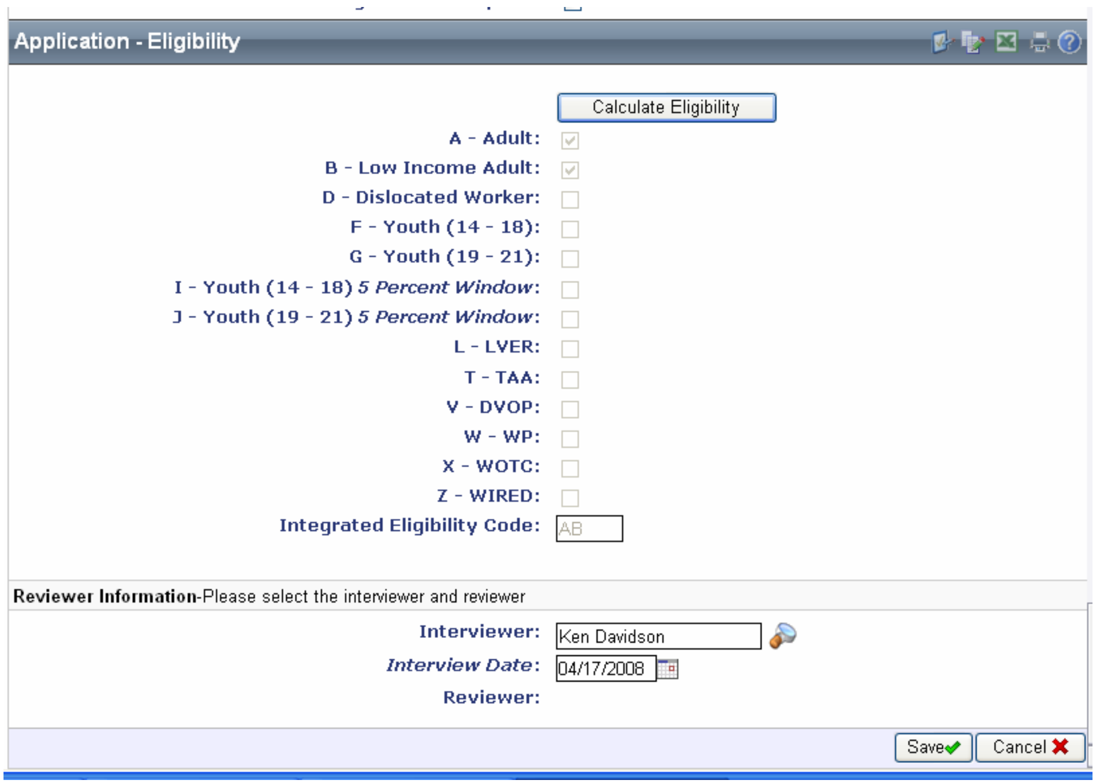
Step 4 – Barriers

The **Barriers to Employment** screen is a formal barriers assessment. By completing this screen, you are providing the participant's first intensive service, which must be recorded by adding an additional service. This assessment is very important for the other programs that may provide services to the participant.

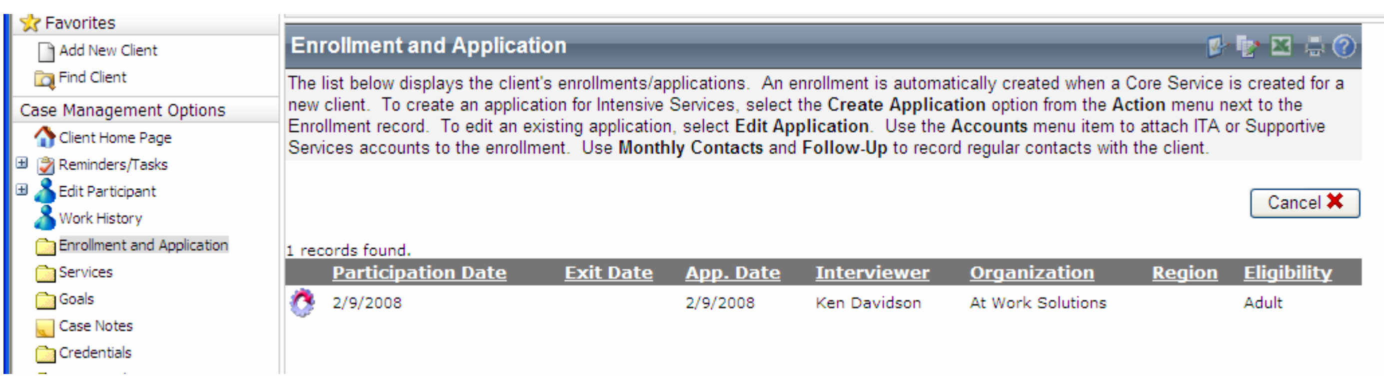


Step 5 – Eligibility

Once all of the required and optional fields are completed to the best of your ability, click the **Calculate Eligibility** button and the system will auto-fill the checks in the boxes next to the programs for which the participant is eligible. Check the boxes closely to see if the participant is showing eligibility for what you thought. If not, then you need to review the application carefully to locate erroneous or missing information.

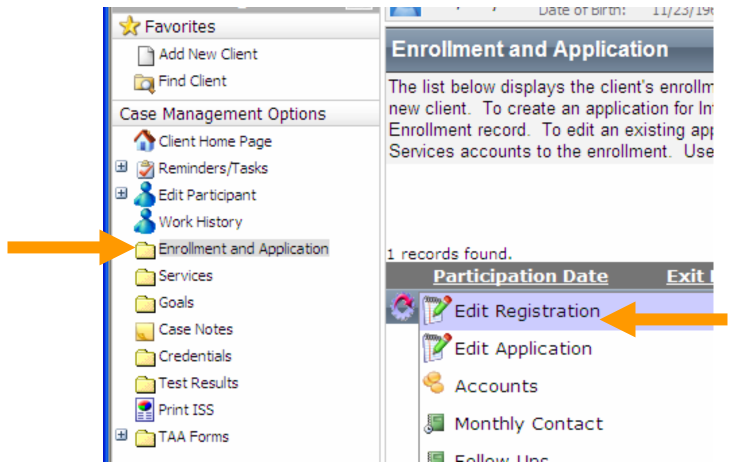


Here is what the **Enrollment and Application** screen will look like once you complete the application, calculate the eligiblity, and click **Finish**:

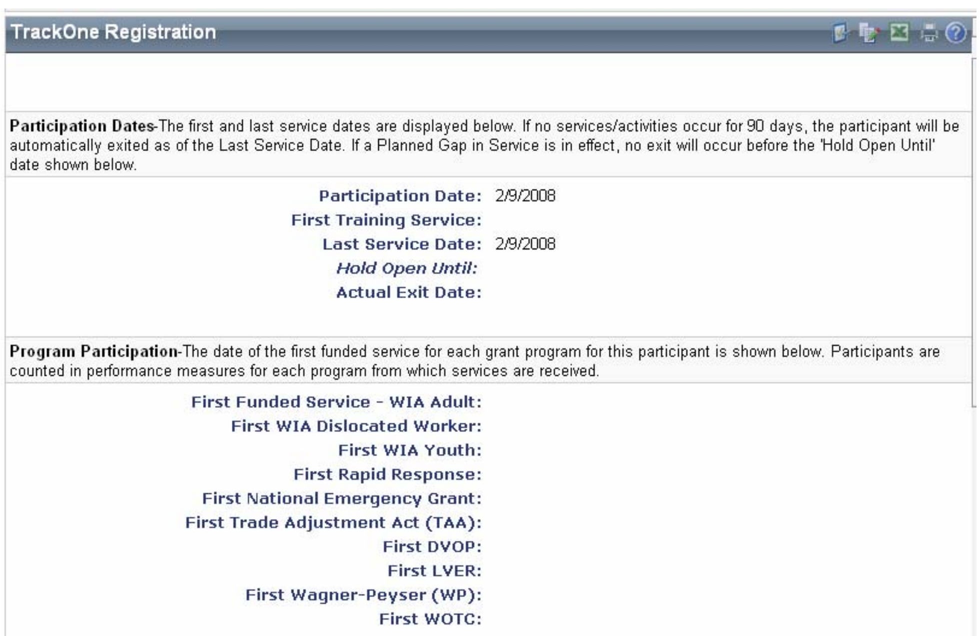


Edit Registration

Once the application is created, the next step is the **Edit Registration** screen. It is located off the enrollment action gear icon. Click on it and the TrackOne registration screen will appear.



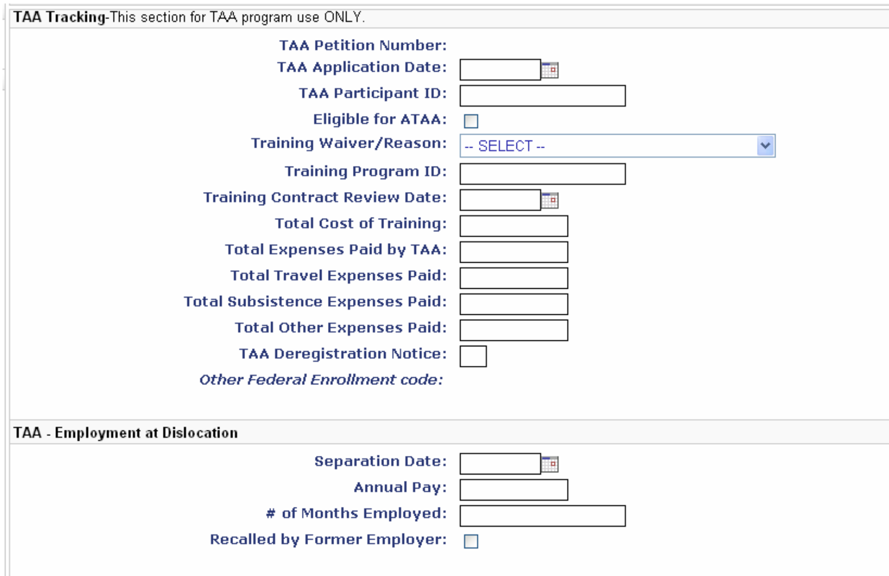
The registration screen displays program participation information in the top two sections and the lower sections gather additional TAA information. The first two sections are milestone dates which are read-only. These are determined by the participant's service history.



Participation Dates: These are auto-filled and show the first and last dates of services. Remember, if 90 days pass without a service, the participant will be exited from the program unless they have been given a planned gap in service.

The next sections are for TAA (Trade Adjustment Act) programmatic tracking.

TAA Tracking



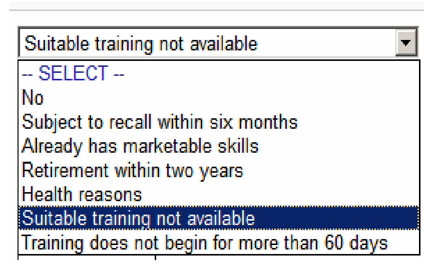
TAA Application Date: Check to ensure that the **TAA Application Date** is accurate. If the participant is dually enrolled in WIA and TAA, the WIA and TAA application dates will be the same.

TAA Petition Number: Company name and location will auto-fill from the Edit Participant screen.

TAA Participant ID: A unique identifier. (No longer needed and is only present for historical data.)

Eligible for ATAA: This field will be completed by the central office upon approval. Central office staff will also enter the **Estimated Weekly Payment** amount. If not eligible, then the reason will appear.

TAA Training Contract/Waiver**:** If a **Training Waiver** is to be issued, the reason will be chosen from a list box. Click the drop down arrow and select the reason.



Other Tracking Information included on the screen:

Training Program ID: Assigned by State TAA Coordinator.

Training Contract Review Date: Assigned by State TAA Coordinator.

Total Cost of Training: Enter value from training plan.

Total Expenses Paid by TAA: Enter value from training plan.

Total Subsistence Expenses Paid: Enter value.

TAA Deregistration: Check this box if a deregistration form has been sent to the State TAA Coordinator.

TAA Employment at Dislocation:

Enter the date of separation from the affected employer.

Enter the participant's annual salary from this employer.

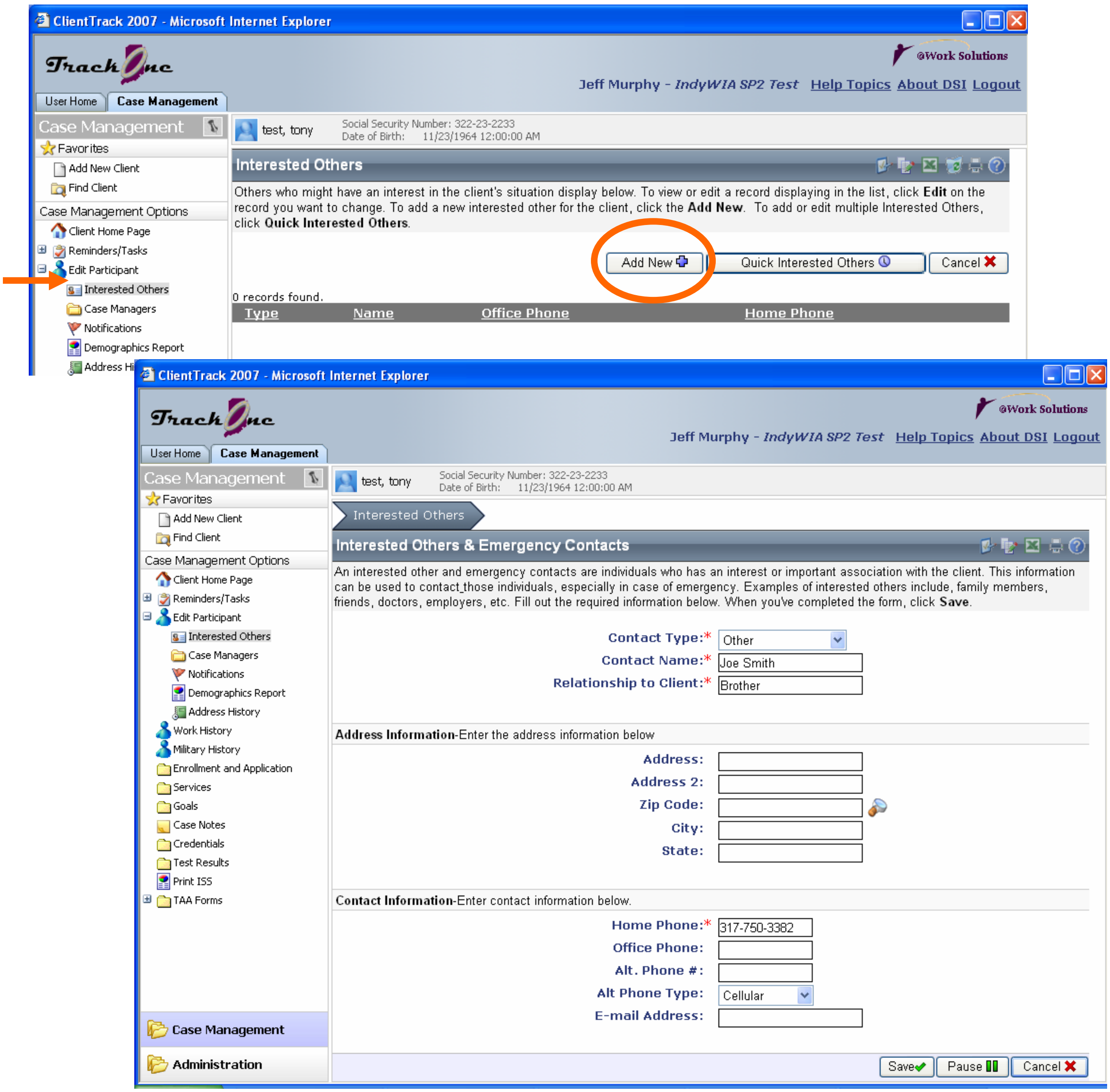
Enter the number of months the participant worked for this employer.

Recalled by Former Employer: Check this box if participant is recalled to work by the affected employer.

Interested Others

It is important to gather contact information for at least one other person associated with the participant. This is sound case management to have an alternate contact for the participant. It is also important for follow-up customer satisfaction surveys conducted statewide for WIA participants.

The Interested Others screen is the place to capture this information. Link is located on the left-hand menu.



1st Intensive Service

Once the application and registration are completed and the client's eligibility has been determined, then further intensive services can be administered. ***One should remember that as soon as the application and registration screens are completed, then an intensive service must be entered into the client record that same day.***

The process for entering an intensive service is identical to entering a core service. If you need to review the process in detail, see the previous section titled **1st Core Service**.

The basic steps to enter an intensive service and requisite information are below:

1. Click **Services** on the TrackOne navigation panel.
2. Click **Add New** on the data entry screen.
3. Enter the begin date.

   Note: Begin date, planned end date, and actual end date should all be the current date.
4. Select a Service Category.
5. Search the available service/activity title by clicking on the **Magnifying Glass** to launch the search function.
6. Enter Service Type by using the drop-down menu.
7. Enter a Funding Stream.
8. Click **Search** to launch the search function.
9. Select the service and provider from the generated list. This will auto-fill the service/activity title, category, line code, service type and provider on the activity screen.
10. **Service Notes**: This is a text box to enter justification, rationalization, or other detailed information pertinent to the activity. **NOTE**: Service notes do not replace case notes. Service notes are not required. Case notes are required.
11. Click **Save.**
12. Enter a **Case Note**.

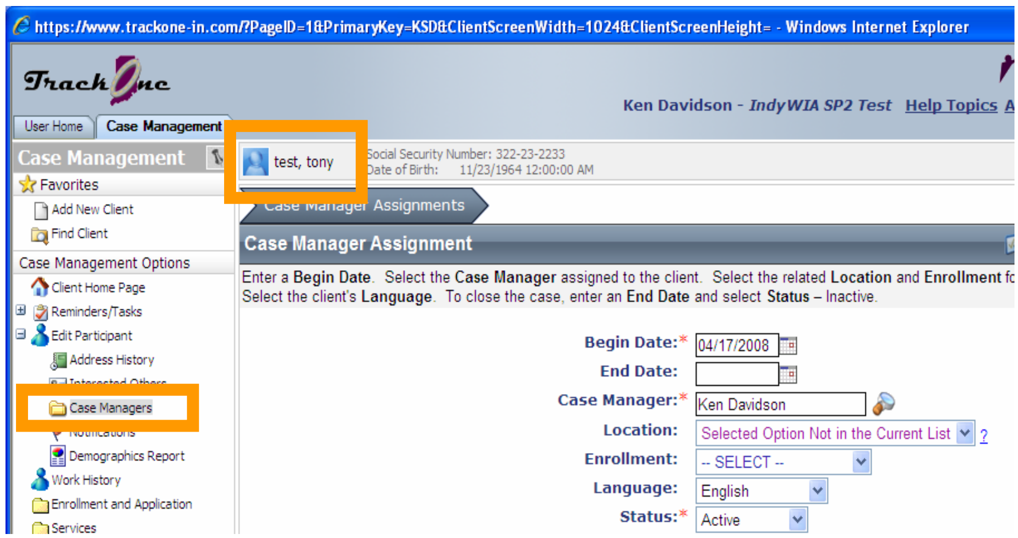
Case Manager Assignment

This screen allows you to assign yourself or others as the case manager for the client record.

It is required that you assign yourself as the case manager for all active cases on your caseload. This will allow you to receive any alerts generated by the system for each of your assigned clients. Additionally, it allows you to generate reports that accurately depict your workload and allows your supervisor to monitor your progress.

NOTE: Supervisors can add themselves as a case manager to each of your client files in order to obtain alerts. This is not required by state policy, but may be required under local office policy.

To assign yourself or another staff to a participant, you need to open their TrackOne folder and go to the **Case Manager Assignment** screen. The link to this screen is under the **Edit Participant** item on the left-hand menu.



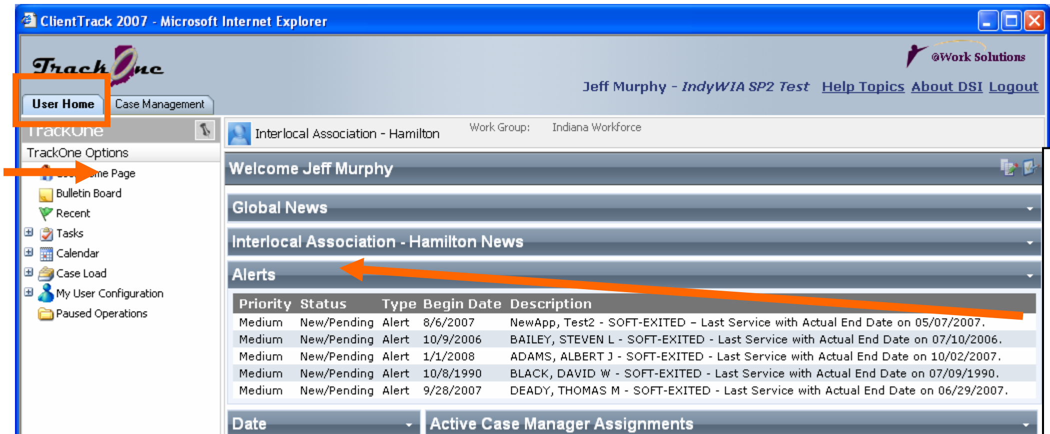
Procedure

1. Click on the **Case Manager** link from the Edit Participant menu on the navigational panel.
2. Click on the **Add New** button.
3. Select the Case Manager.
4. Select the Location, Enrollment, Language and Status from the drop-down menus.
5. Click on the **Save** button.
6. Click on the **User Home** tab.
7. Click on the **Case Load** link on navigational panel.
8. Click on the paintbrush icon for your client record.
9. Add an End Date.
10. Click the **Save** button.

Note: The **Case Manager** field will automatically populate with the name of the signed-in user. If you wish to add another user you must search for them using the search icon (magnifying glass)

Alerts

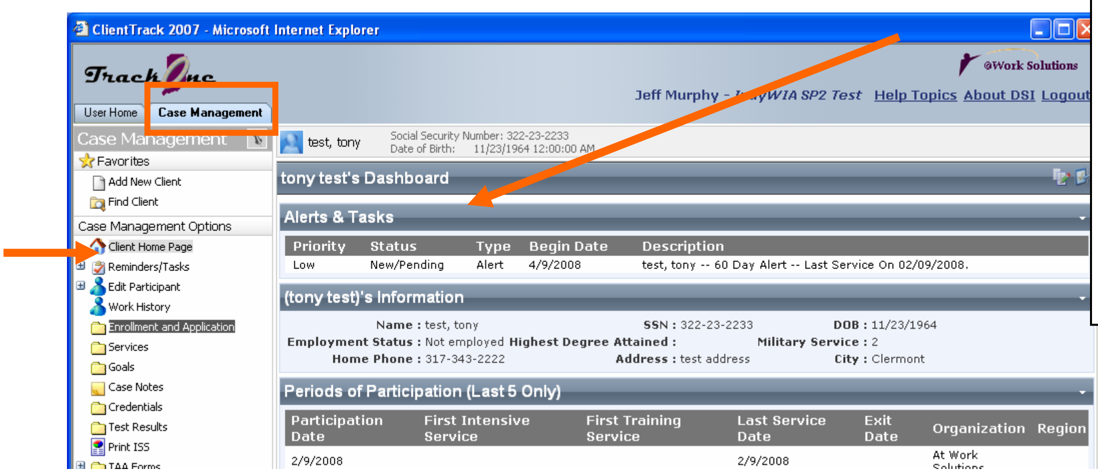
Adding yourself as a case manager is essential for reporting purposes and for alerts. If you are listed as a case manager for a client, you will receive all of the alerts for that client warning you of a possible soft exit.



Alerts appear on the **User Home Page** on the **User Home** tab. (These are for everyone on the case manager's caseload.)

&

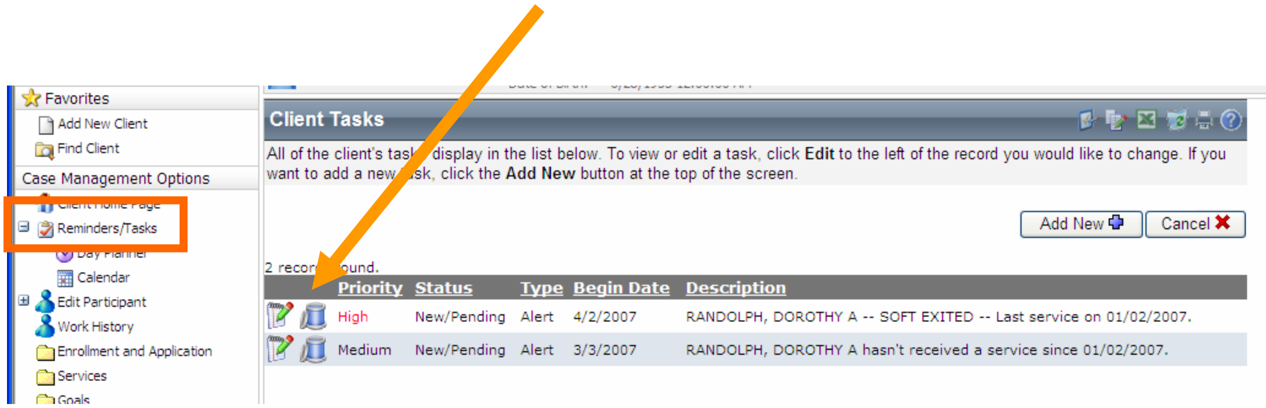
Client Home Page on the **Case Management** tab**.** (These are the alerts for the participant's file opened.)



Alerts will warn the assigned case manager when the client has gone 30 and 60 days without a soft exit, and will inform the case manager when the client has been soft exited after 90 days with no services.

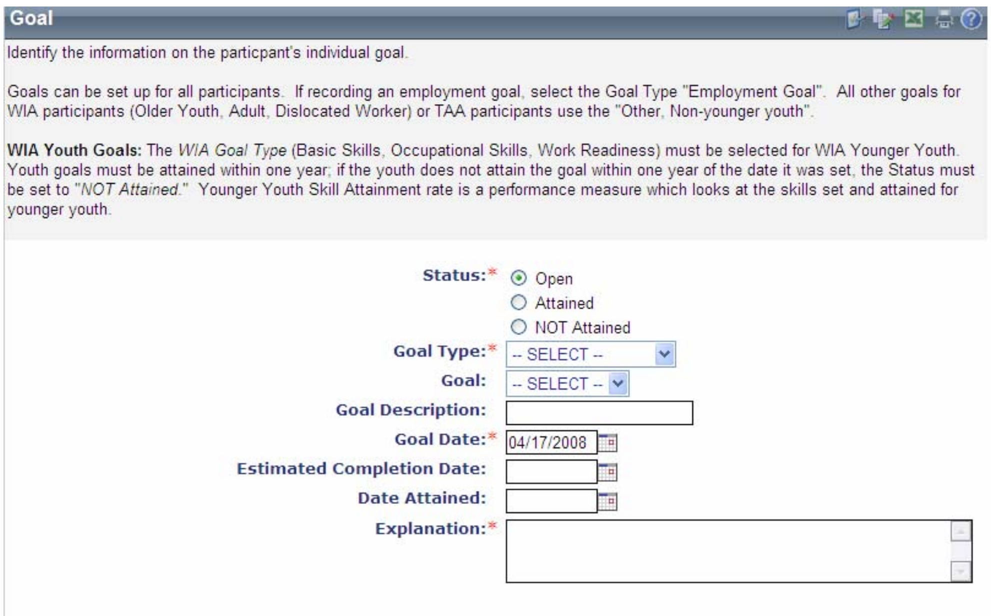
Once an alert has been generated, it will remain on the users home page until it is deleted by the user. To delete the alert:

1. Click on **Remibders/Tasks**.
2. This will bring up a list of all of the alerts for your case load.
3. Find the alert(s) that you wish to delete.
4. Click on the delete icon to the left of the alert that you wish to delete.



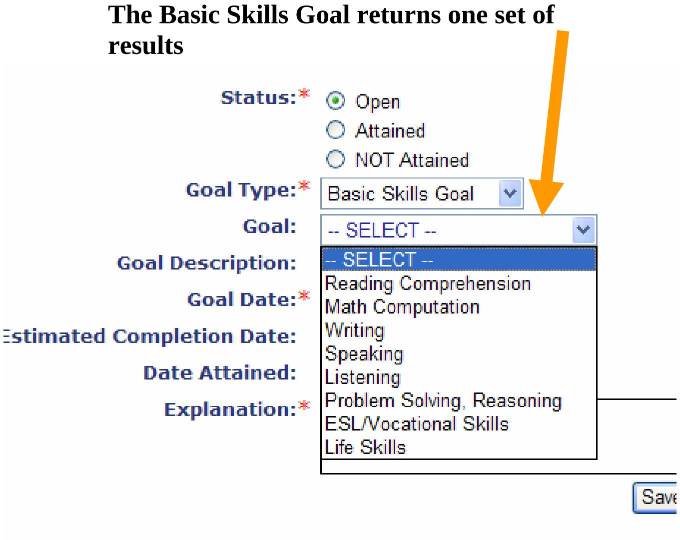
Goals

Goals and goal setting are recognized as being critical for success. While goals are only a required service for WIA younger youth, you should work with all participants to negotiate realistic and well defined goals. This is recommended as a case management best practice and to encourage the participant to take ownership of the services he/she receives.

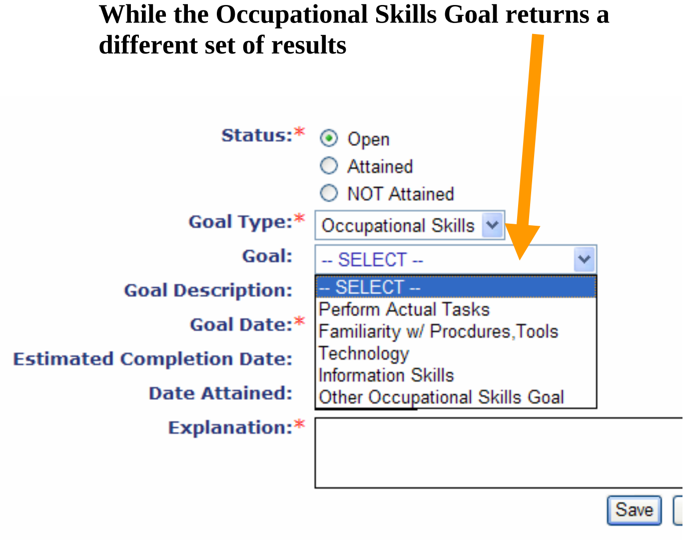


NOTE: The dropdown selection of **Goal** will vary depending on what is selected for **Goal Type**.

The Basic Skills Goal returns one set of results



While the Occupational Skills Goal returns a different set of results



Important! Goals are **required** for WIA Youth. Additionally, it is good case management to set goals for adults. Career planning should be recorded in adult's goals.

Procedure

1. Select **Goals** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Click the applicable goal Status (Open, Attained, and Not Attained).
4. Enter the Goal Type by using the drop-down menu.
5. Enter the Goal by using the drop-down menu.
6. Enter the Goal Description detail information.
7. Enter the Goal Date.
8. Enter the Estimated Completion Date.

Note that the Date Attained is entered when the goal is completed.

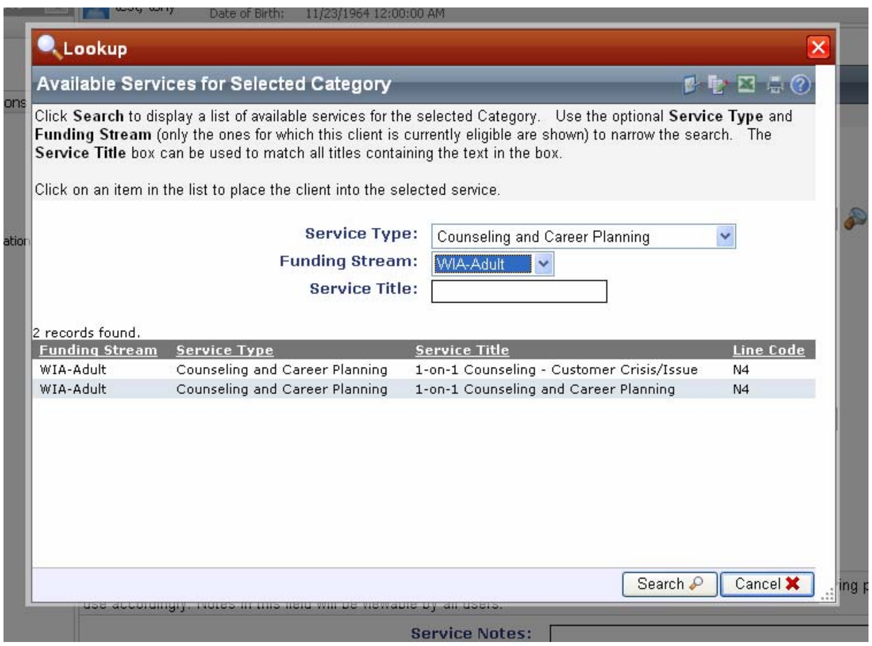
9. Enter an Explanation.
10. Click the **Save** button.

Services (on-going)

As clients receive services during their enrollment, it is important to capture these in TrackOne. The process is the same as adding the original core service, except there are more choices of services available once the application has been created and eligibility has been established.

The funding stream that is selected when the service is added will indicate which program the client will be enrolled.

Important! You will only get results for services for which the client is eligible. For example, if the client does not show TAA eligible on the **Enrollment and Application** screen that you will get **No Results Found** for any TAA services. If this occurs you must update the application.



Planned End Date vs. Actual End Date

- For an activity completed the same day it's given, change the status field to complete and all date fields should show the same date.
- For an activity that spans multiple days, the planned end date is just that—the date you have planned for the service to be complete. When the service actually ends, update the service record with the actual end date (may or may not be the same) and change the status to complete.
- Planned end date is used to determine the soft exit. If it's a future date, the system recognizes that the client has an active service. If you do not change the planned end date or enter an actual end date, the system will use this as the basis for soft-exit calculations.

Reminders about Services

- The first intensive service is taking the application.
- Eligibility determination and conducting the barriers assessment as part of the application are considered intensive services. An Intensive Service MUST BE ADDED right after the application is created.
- The begin date for services can only go back 3 days—this reinforces the need for documentation at point of service.
- Service notes are intended to be a summary description on the ISS—not a substitution for case notes. These notes are limited to 255 characters.

Why bother to change the status field to complete? Because it makes it possible for you to run real-time reports!

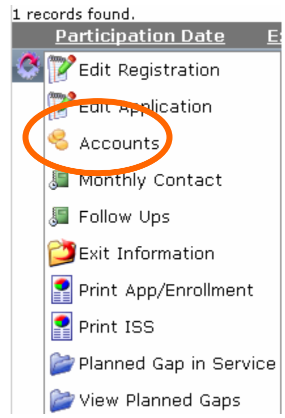
Adding Accounts and Obligations

Adding Accounts

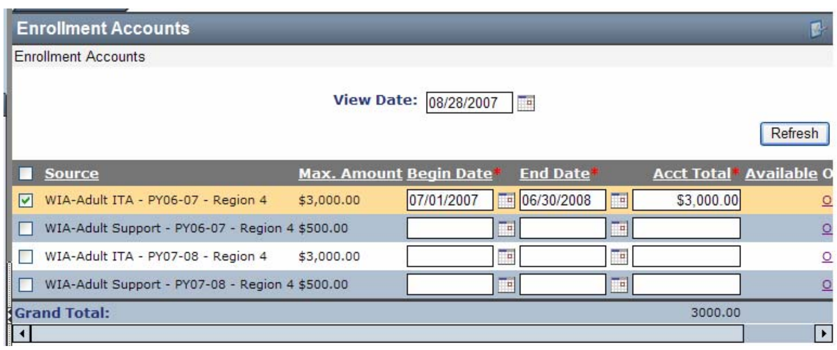
In order to add an obligation to a client's file, you must first set up and account for that client.

To set up an account:

1. Select **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click on the Gear icon to display the various actions associated with the enrollment.
3. Click on **Accounts**.



4. Select the account that you wish to create by clicking the check box



5. Select the dates for that account and the account total. The account total can not exceed the maximum amount as set by your region.

Note: Begin date defaults to the date that you are creating the account and the end date defaults to the end of the program year. These dates can be changed, but the account will be hidden after the end date has passed

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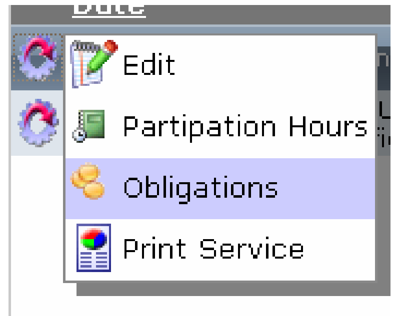
6. Repeat the process for all accounts you want to set up and click **Finish.**

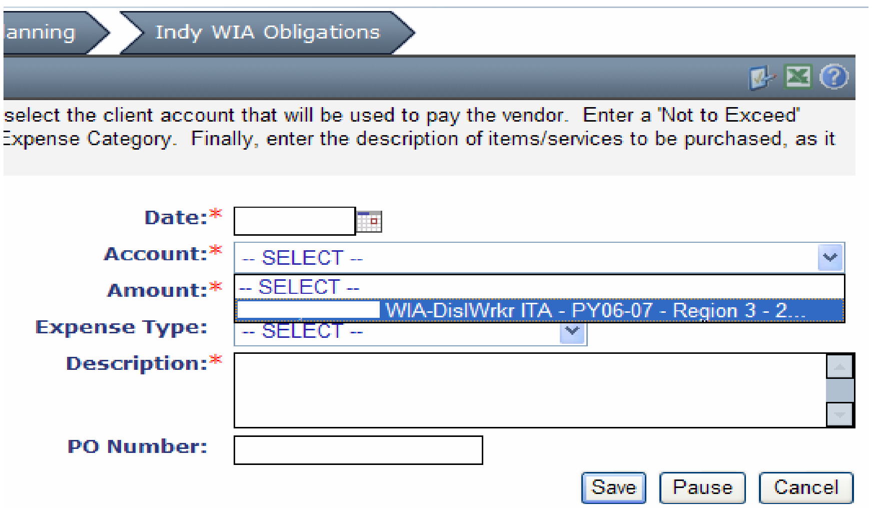
Note: The participant's eligibility determines which program accounts are available. The accounts are also limited to the region associated with the participant's application.

Obligations

Once the account is set up, you can add obligations from the account to services. To add an obligation:



1. Select **Services** on the TrackOne Navigation Panel.
2. Find the service to which you wish to add the obligation. (Note: Not all services allow obligations.)
3. Click the service action icon and select **Obligations**.
4. Click the **Add New** button and enter in all required information.

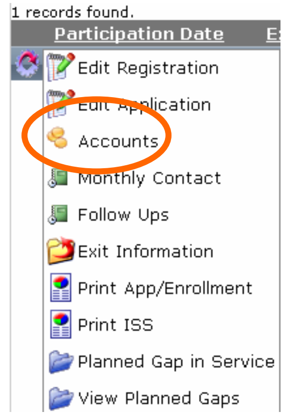


The account(s) that you set up for the client should appear in the drop down box in the **Account** field.

5. Click **Save**.

Account Summary

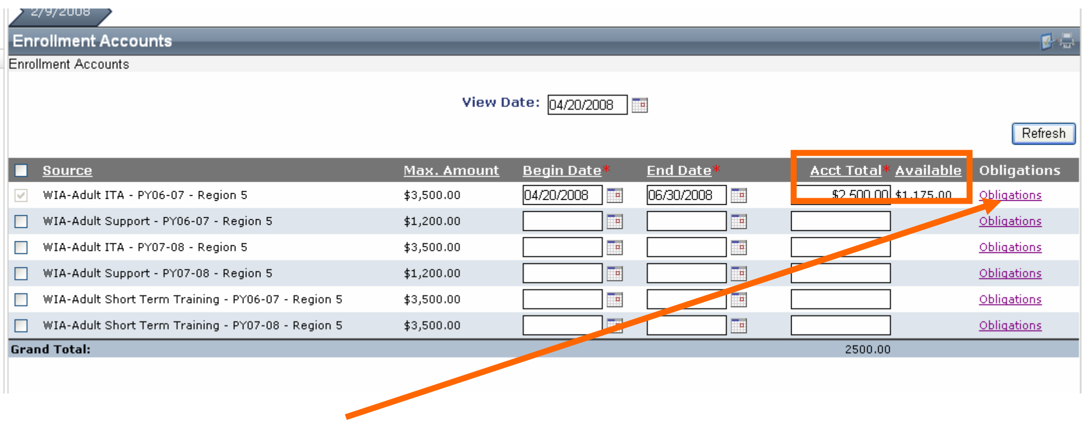
The running balance of the participant's account can be view on the accounts screen.



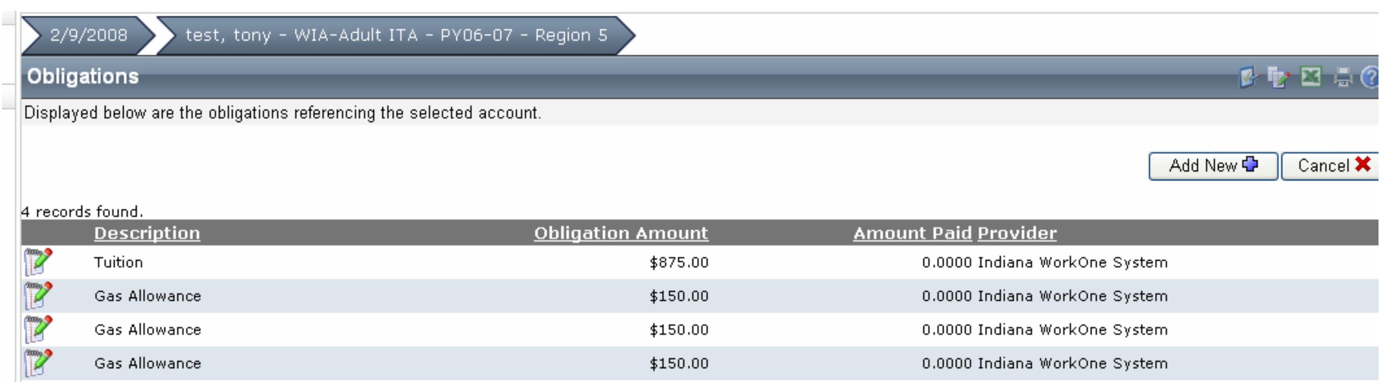
To view account summary:

1. Select **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click on the Gear icon to display the various actions associated with the enrollment.
3. Click on **Accounts**.

The Account Total column displays the starting balance. The Available column is the remaining amount.



Clicking on the word Obligations will display the individual obligations against the account.



Adding Case Notes

Case notation is essential to case management. It is essential that case notes be focused on the services provided, contain detailed information documenting service delivery and record the flow of the case management process. Case notes are NOT intended for case managers to write their personal feelings, frustrations or opinions about the participant and his/her progress. Case notes should be factual and concise.

NOTE: Case notes cannot be deleted in TrackOne. They can be amended through the addition of another case note if necessary, but cannot be edited once they are saved.

Procedure

1. Select **Case Notes** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter Regarding Information.
4. Enter the Case Note.
5. Click **Save**. Note that saved case notes cannot be modified.

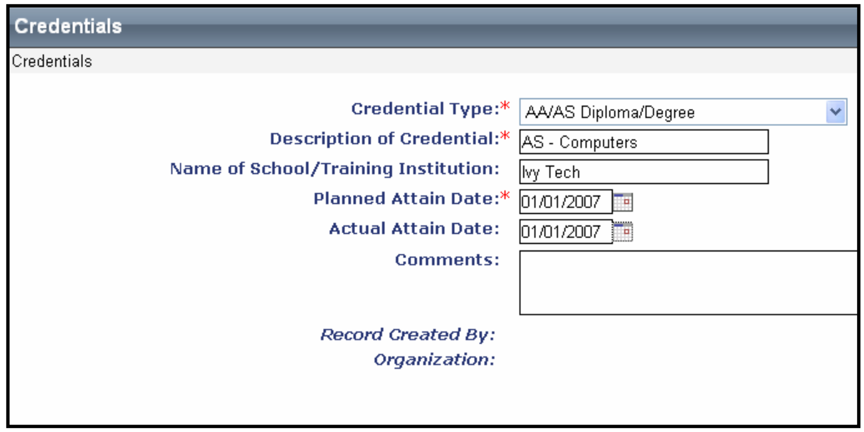
Notes

- While creating a case note, you are given a toolbar similar to MS Word
- This is where all the details of your work are to be recorded. All case notes print on the ISS.
- DO NOT complete a separate case note for each service provided during the same visit. Create one case note for the VISIT and document all services in that visit.

Adding Credentials

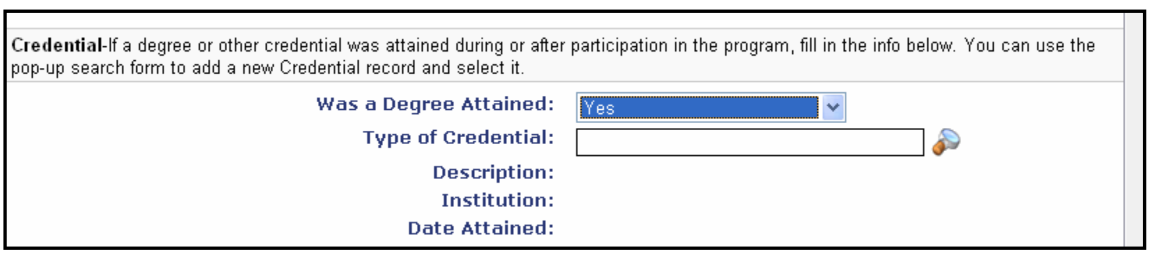
Credentials are standards of achievement that verify a level of skill attainment. When a client finishes a training program, a record of the credential attained needs to be entered into TrackOne.

Procedure



1. Click **Credentials** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Select the Credential Type by using the drop-down menu.
4. Enter the Description.
5. Enter the Planned Attain Date. Actual Attain Date will be entered upon completion of the Credential.
6. Enter any Comments.
7. Click the **Save** button.

NOTE: Credentials are important for performance. The Exit Information screen and the Follow-up Contact screen provide the user a magnifying glass to find an existing credential for a participant or to add a new one.

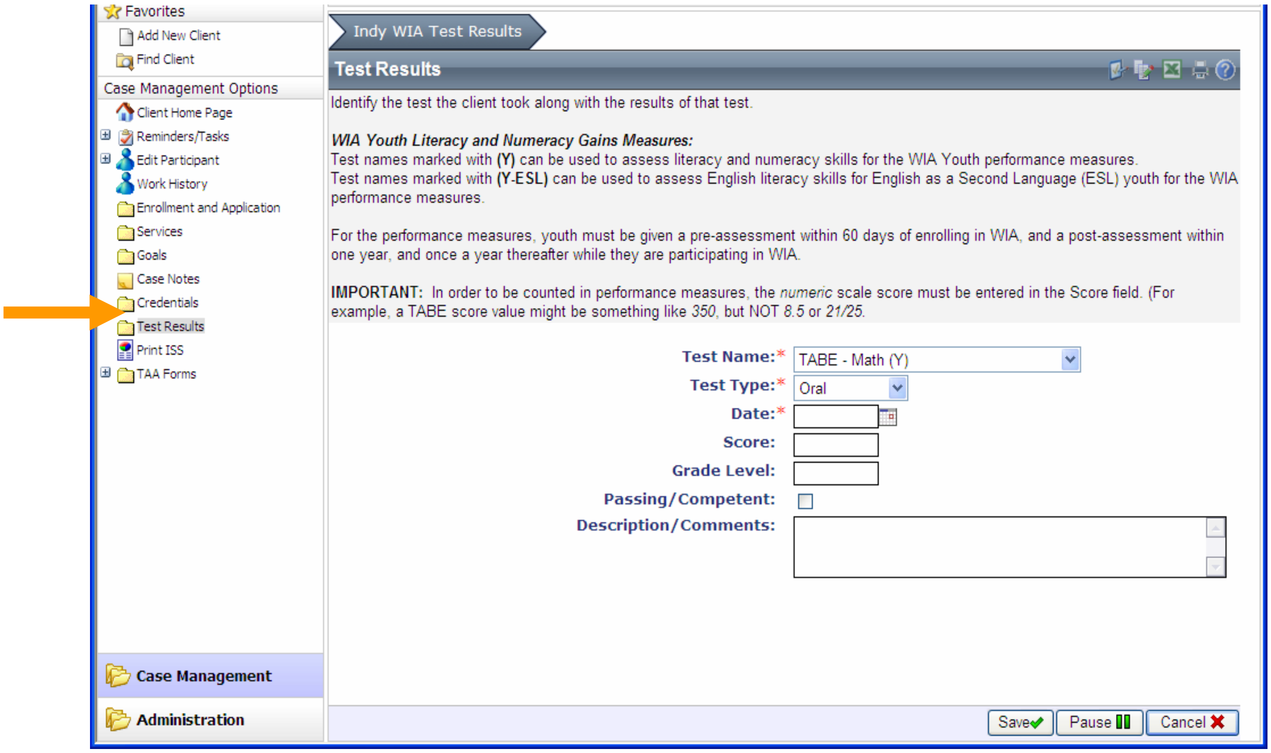


Notes

- It is important to note anything beyond a high school diploma as a credential at the time of application.
- If the client achieves another credential, you will come back and add that on these screens.
- This is where you record the performance outcome.
- This is information that is also helpful as you work with the client to create a resume.

Assessment/Test results

Conducting formal assessments are a large part of the case management process. Formal assessments are essential to determining the participant's skills and abilities prior to entering him/her in to training programs. Assessments, and their results, need to be entered in TrackOne.



Procedure

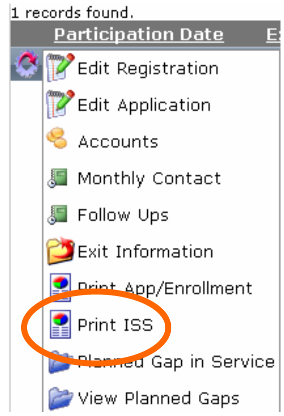
1. Click **Test Results** on the TrackOne Navigation Panel.
2. Click **Add New** on the Data Entry Screen.
3. Enter the Test Name by using the drop-down menu.
4. Enter the Test Type by using the drop-down menu.
5. Enter the Date (mmddyyyy).
6. Enter the test score.
7. Enter the grade level achieved based on the test score.
8. Click the Passing/Competent box based on the test results.
9. Enter the Description/Comments.
10. Click the **Save** button.

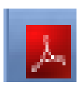
ISS (Individual Service Strategy / Individual Employment Plan)

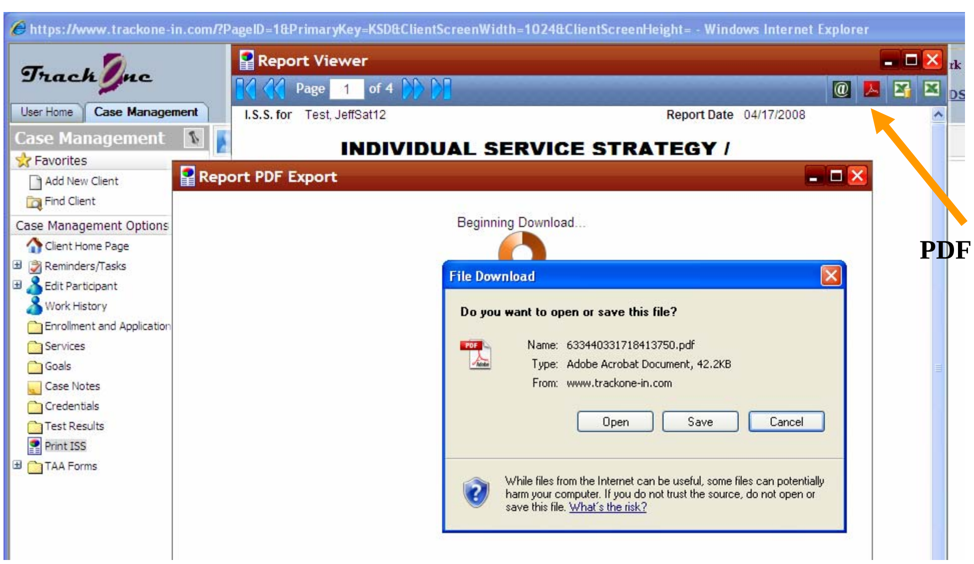
A written case management plan is essential to the case management process.

TrackOne simplifies this greatly by creating an Individual Service Strategy/Individual Employment Plan automatically. TrackOne “mines” data from all of the participant transaction records the case manager has created in the system. The system then populates the fields in the ISS/IEP form with the data previously entered.

To print an ISS:



1. Select **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click on the Gear icon to display the various actions associated with the enrollment.
3. Click on **Print ISS**.
4. The ISS will generate and be displayed on the screen in a Report Viewer window. (In order to print an ISS, it must first be exported into a printable format. TrackOne can convert the file into .pdf format that you can save to your pc or print.)
5. Click the .pdf Icon  at the top of the ISS.
6. Click **OPEN**.
7. The ISS will then be converted into a .pdf file through Adobe Reader.
8. Use the print option in Adobe Reader to print the file.

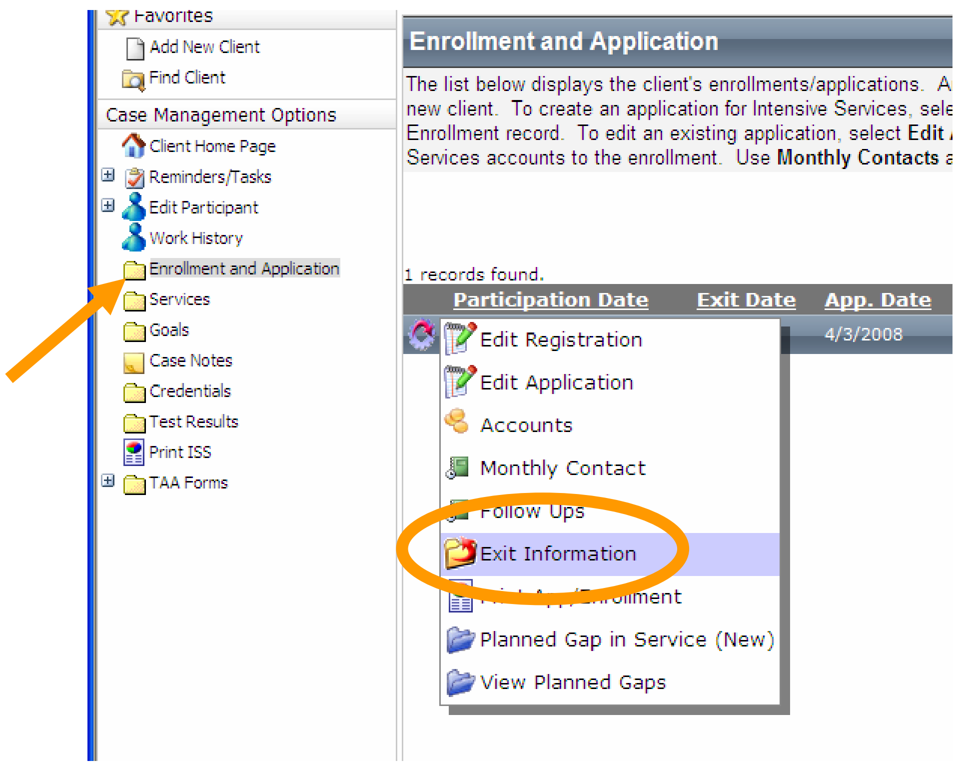


PDF Icon

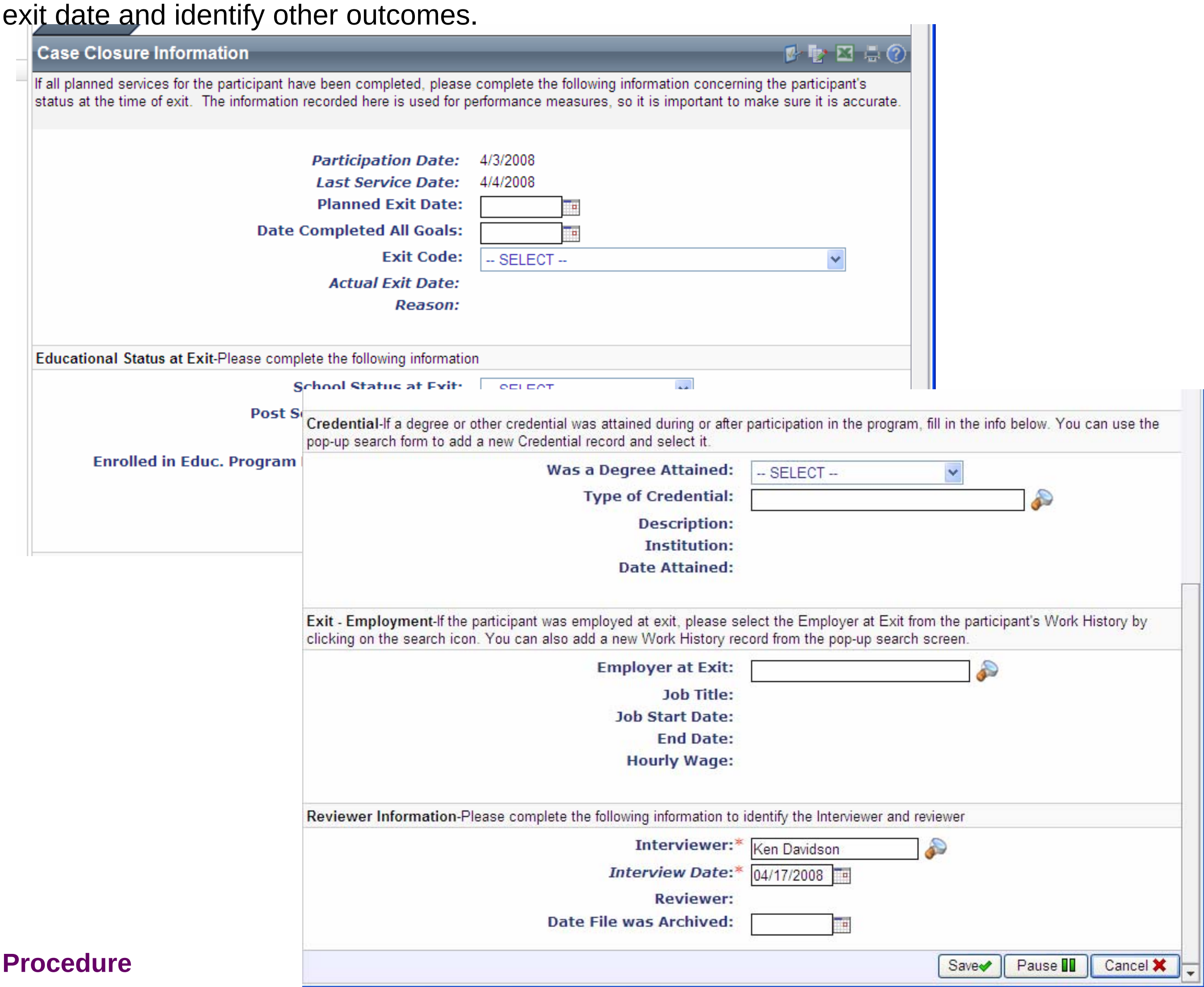
Exit Information Screen

When a participant has completed all training, case management goals and no other significant staff involved/intensive/training services are necessary for the participant to be successful, the case manager must exit the participant from the program.

NOTE: Under common measures, the participant is exited from all programs he/she are enrolled on the same date. In other words, if a participant is co-enrolled in WIA and TAA, the participant is not exited from either program until the participant meets the exit criteria for both programs. Please refer to the information on common exit dates in the **Common Measures information** located on the **DWD TrackOne Technical Guidance & Resources** website.



Under common measures participants are officially soft-exited after 90 days of no services. For purposes of planning and tracking it is good practice to record a planned-exit date and identify other outcomes.



Procedure

1. Click **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click the **Gear** icon left of the application and select Exit Information.
3. Complete the **Case Closure Information** screen with all applicable information.
4. Click the **Save** button.

Important! A client is not officially exited until 90 days after the end date of the last service. Completing the **Exit Information** screen is important for reporting and data integrity, but an exit date will not appear for the client until the 90 soft exit has occurred.

Follow-up *Services*

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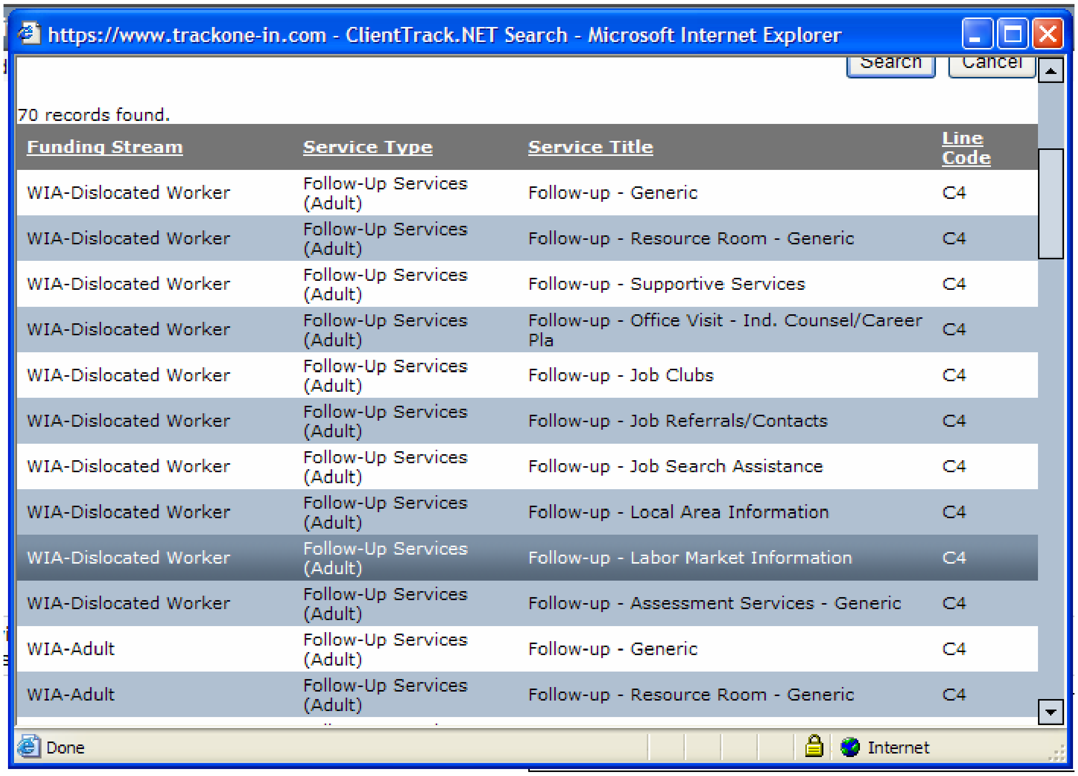


70 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Generic	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Resource Room - Generic	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Supportive Services	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Office Visit - Ind. Counsel/Career Pla	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Job Clubs	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Job Referrals/Contacts	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Job Search Assistance	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Local Area Information	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Labor Market Information	C4
WIA-Dislocated Worker	Follow-Up Services (Adult)	Follow-up - Assessment Services - Generic	C4
WIA-Adult	Follow-Up Services (Adult)	Follow-up - Generic	C4
WIA-Adult	Follow-Up Services (Adult)	Follow-up - Resource Room - Generic	C4

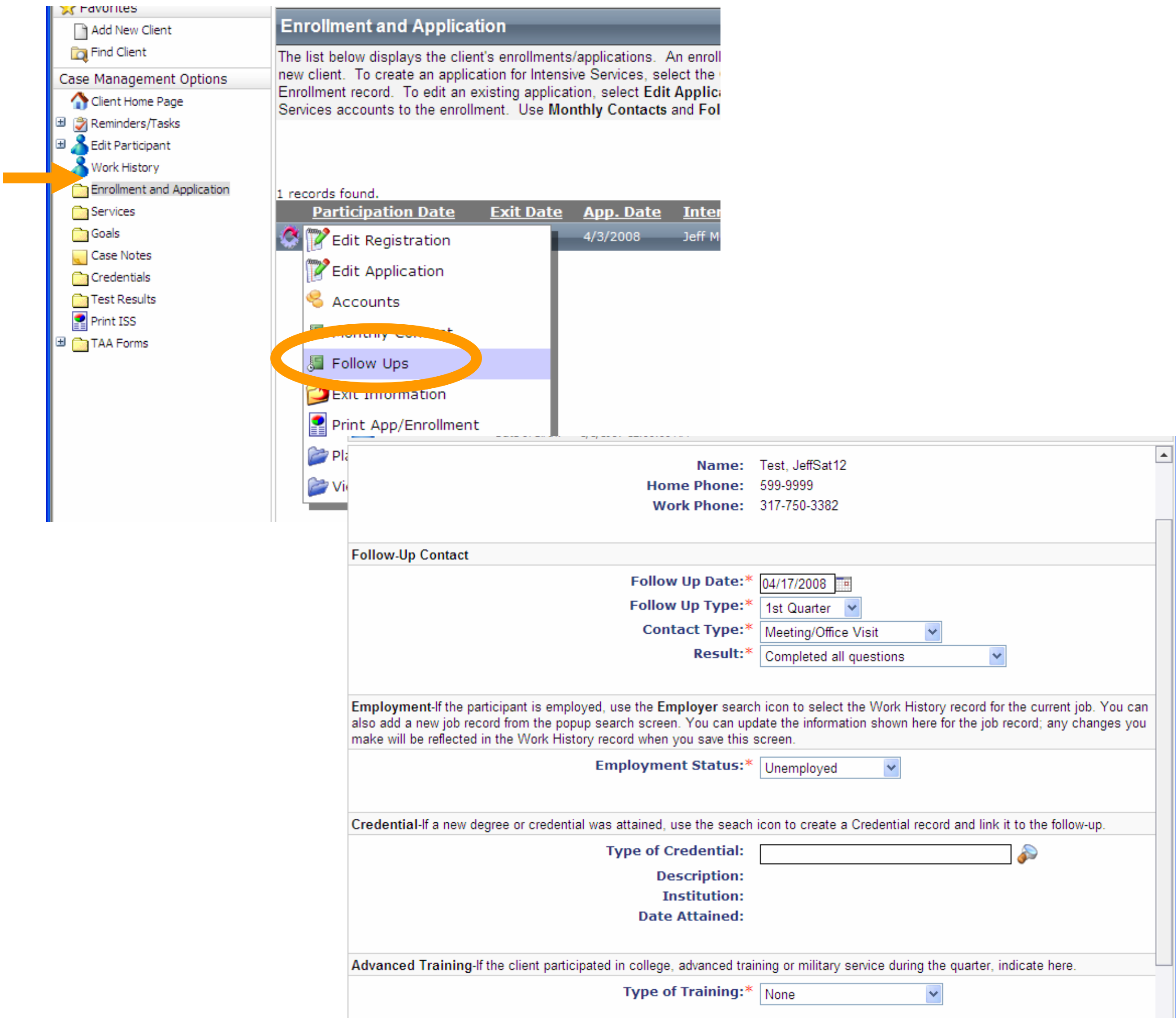
- ***Follow-up services*** are those that do not “restart the clock” if you use them.
- You add a follow-up service the same way that you add any other service in TrackOne.
- These contacts and services do not count toward participation or performance calculations.

Important! Follow-up services are different from follow-up contacts and are entered in the service screen. Follow-up contacts, which are used in performance calculations, are entered under the **Enrollment and Application** screen (this is explained in detail in the next section).

A list of these services are available on the DWD website.

Follow-up *Contacts*

Follow-up contacts to the client are entered under the **Enrollment and Application** screen.



Procedure

1. Click **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click the  **Gear** icon left of the application.
3. Click **Follow Ups** on the menu.
4. Click **Add New.**
5. Complete the Follow up contact screen with all applicable information.
6. Click **Save.**
7. Enter a case note.

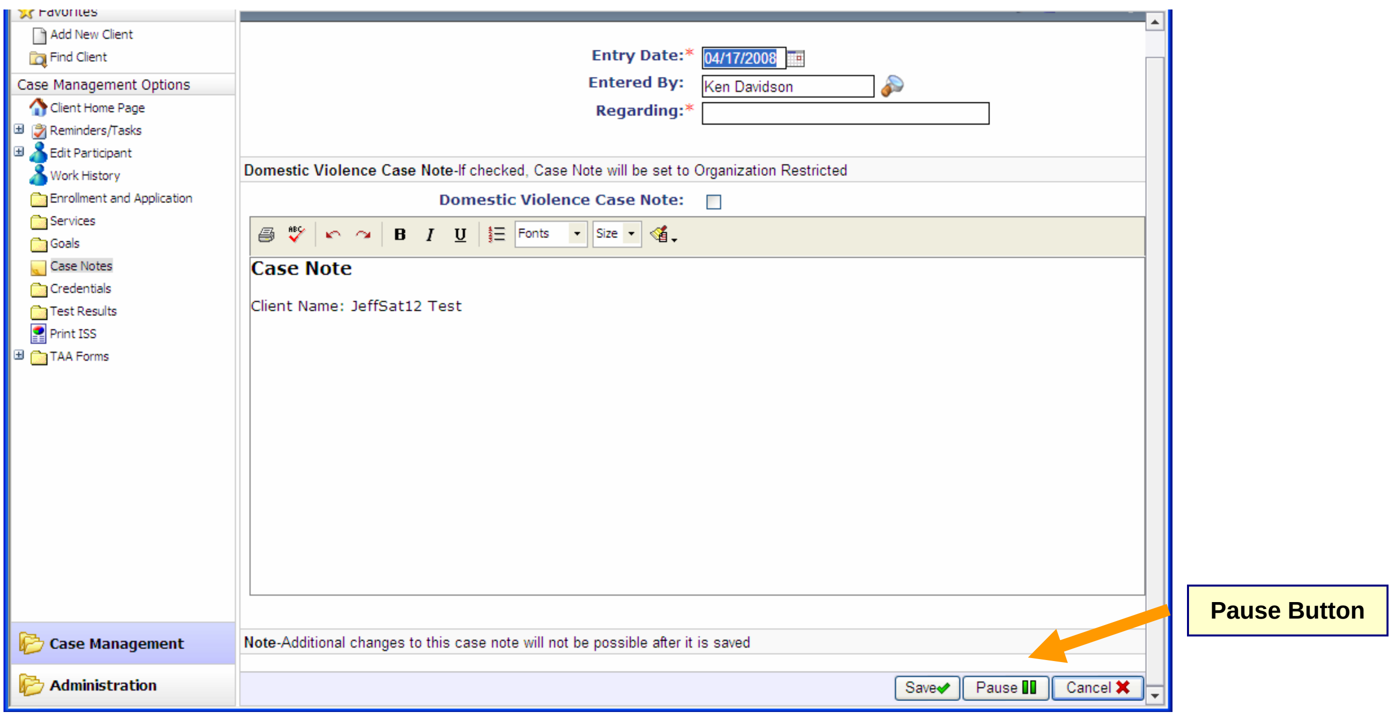
Paused Operations

For security purposes, TrackOne will time out after 30 minutes of inactivity. Interruptions are a normal part of our work lives. The paused operations function allows case managers to temporarily "freeze" their work before it is written to the database. Your work is stored in a special location under the **User Home** tab. When you are ready to finish and save your work to the database, click on the **User Home** tab, then click the **Paused Operations** icon on the navigation pane. Your paused work item will open and you can proceed.

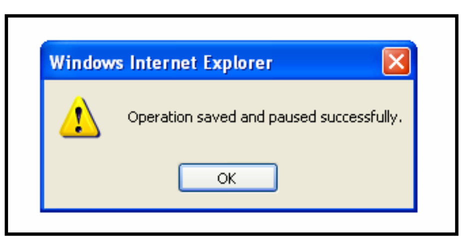
The following are some scenarios where **Paused Operations** are helpful:

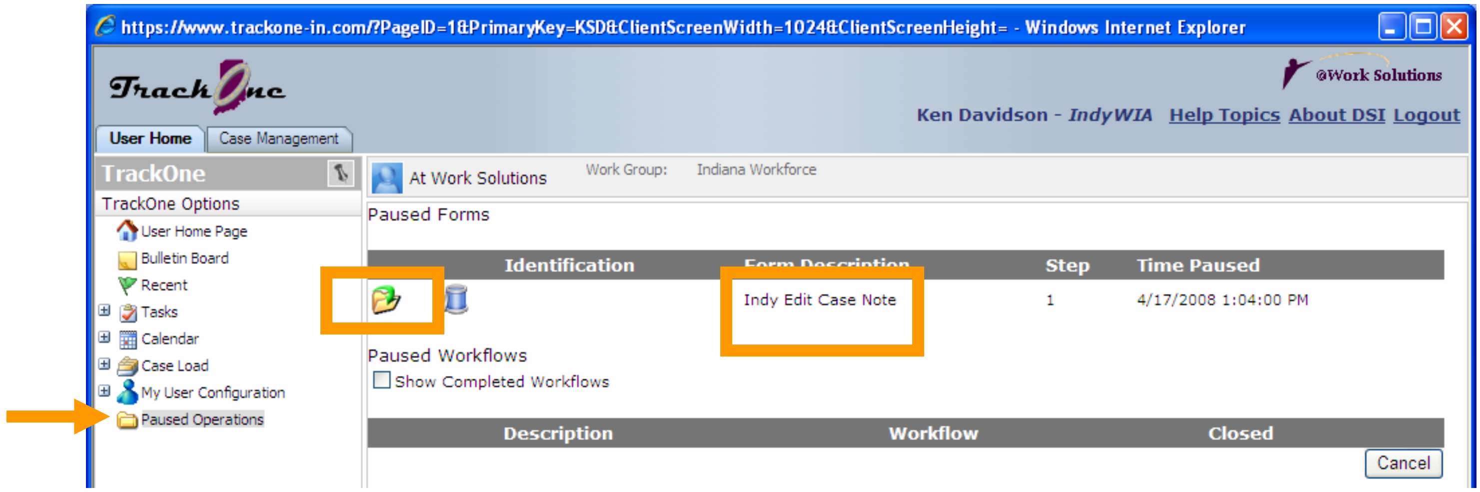
- A fire alarm goes off.
- Client shows up for an appointment, but forgot an important piece of documentation necessary for the eligibility determination process.
- Client leaves in the middle of an eligibility determination appointment to visit the restroom and doesn't return.

Most all screens have a **Pause** button at the bottom of the screen next to the **Save** button.



A pop-up window will appear verifying the operation is paused.





All paused operations will appear under the **Paused Operations** icon on the **User Home** tab. When you get to this screen, you will see all of your paused operations and you will have the choice of resuming the record (this will pick up where you left off) or deleting the paused operation. The **Form Description** field tells you which screen you were on when you paused the operation. This is where you will be taken back to if you choose to resume the data entry.

NOTE: Since the **Paused Operations** icon is located on the **User Home** tab, you will be able to view all of the operations that you have paused for all of your clients. This is not associated with the client's folder, so the user who paused it will be the only one who can see and resume/delete the operation.

Procedures

To Pause an Operation

Click the **Pause** button. Note that if you do nothing with the application for a certain period of time, it will time out (pause) automatically, but choosing to pause is safer.

To Resume an Operation

1. To find your Paused Operations, go to the **User Home** tab.
2. Click **Paused Operations** on the **TrackOne** section of the navigation panel.
3. Select the operation you want to resume by clicking it.
4. Complete the information.
5. Click **Save.**