

# Introduction to TrackOne Navigation

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## 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

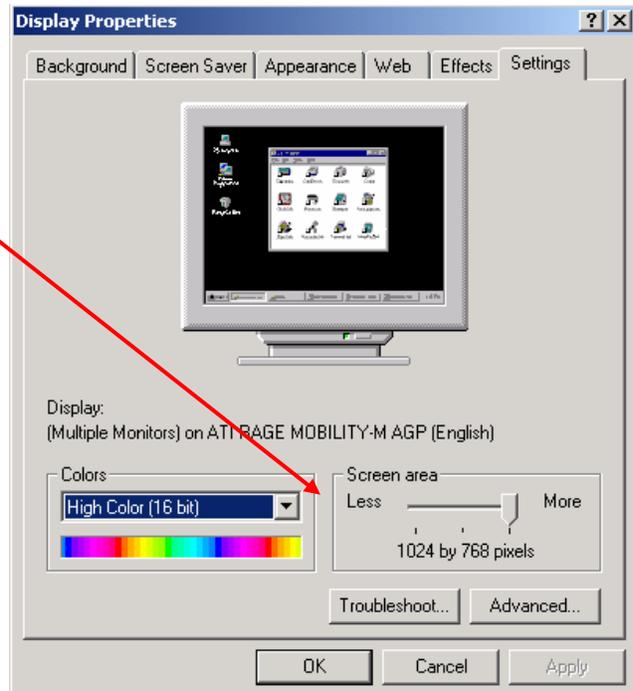
TrackOne is designed to run on Microsoft Internet Explorer version 5.5 and higher. Operation of TrackOne depends on the browser, *not* the operating system installed on the computer. If the system will run Internet Explorer 5.5 or higher, TrackOne should operate normally. The program will not operate 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:**

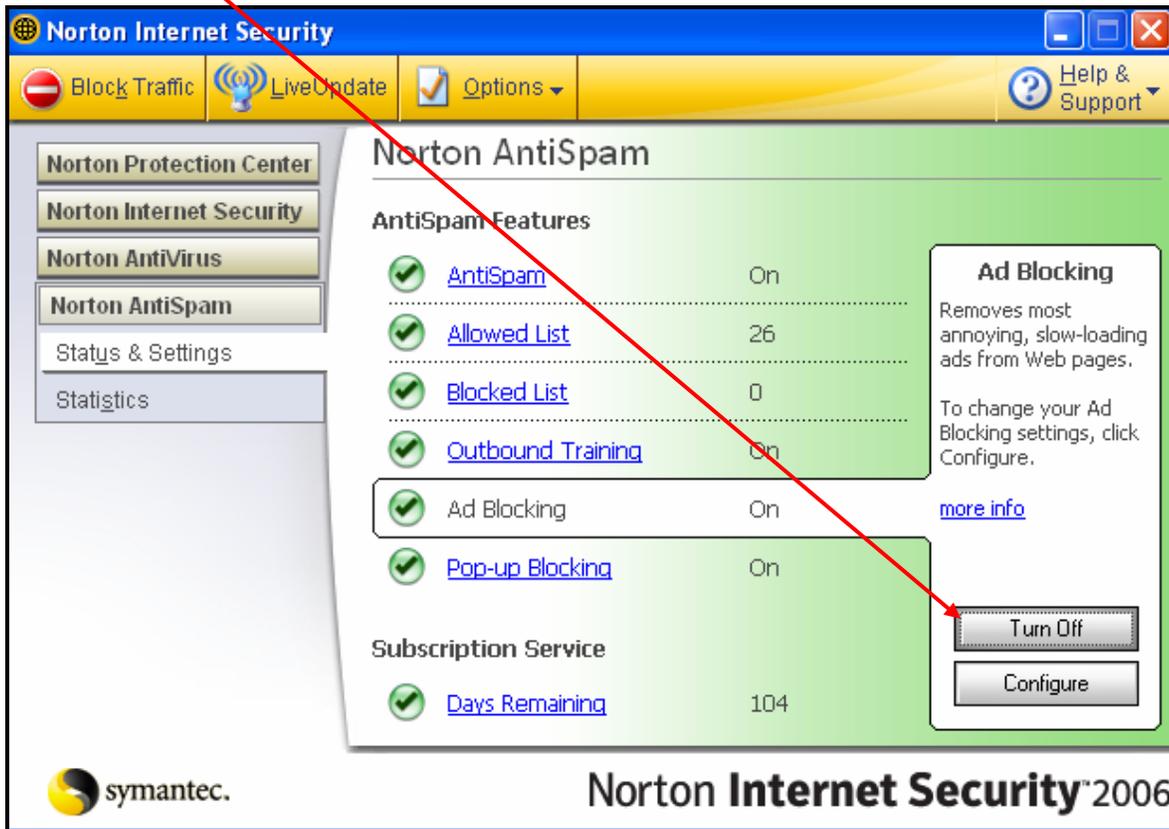
**To turn off pop-up blocking in Norton Internet Security:**

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



## Getting Started - TrackOne Navigational Training

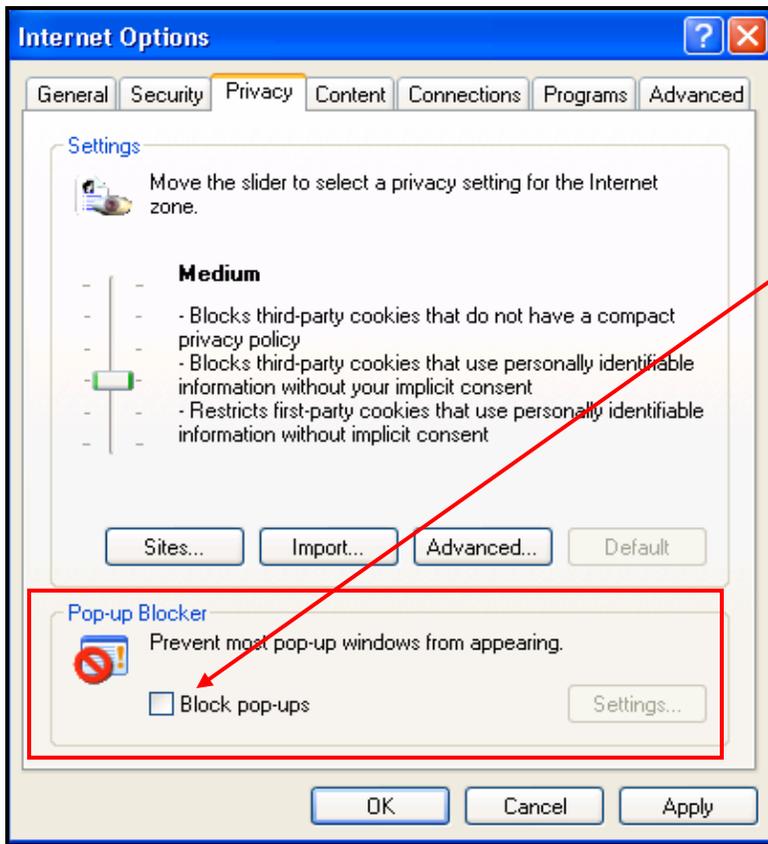
3. Click **Ad Blocking**
4. Click **Turn Off**



### To turn off pop-up blocking in Internet Explorer:

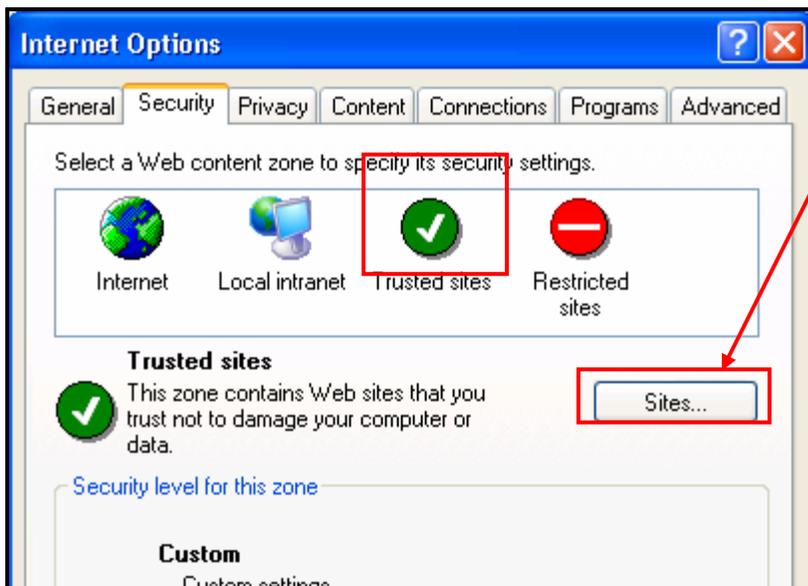
1. In your **Internet Explorer** window, open the **Tools** menu and click **Internet Options**. Click the **Privacy** tab. At the bottom of that window, you'll see a **Block Pop-ups** checkbox. Make sure that box is not checked.





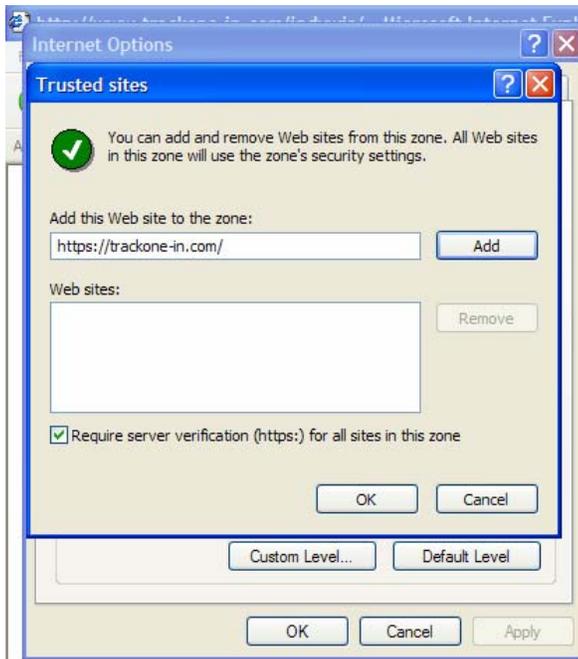
Uncheck  
Block  
Pop-ups

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.

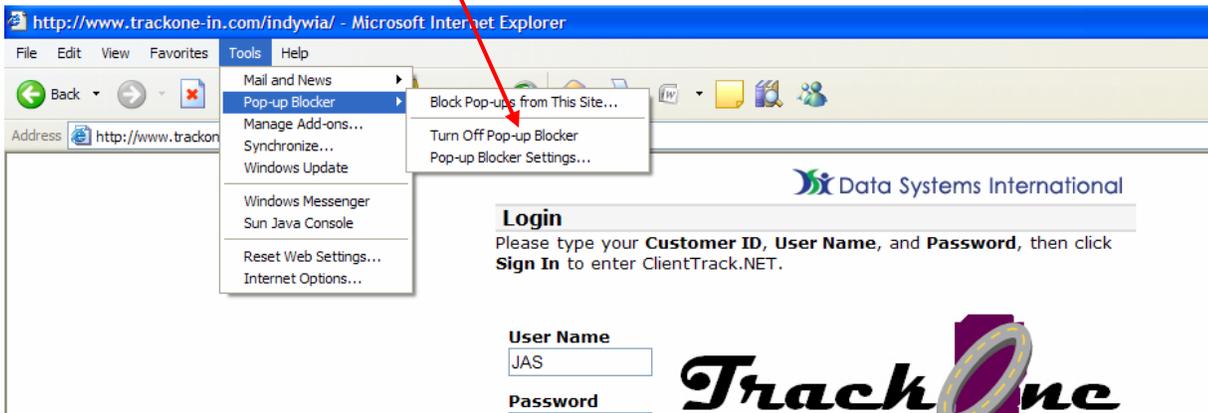


### Getting Started - TrackOne Navigational Training

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.

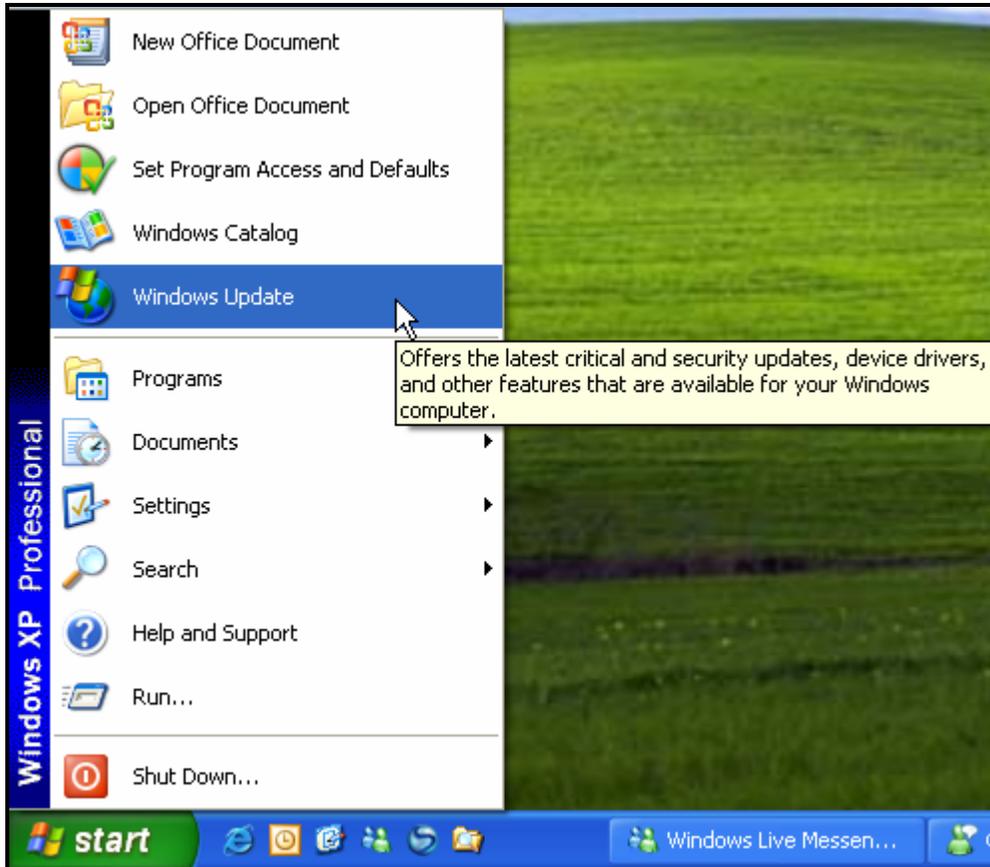


4. In the **Internet Explorer** toolbar, click **Tools**, and then scroll your mouse over **Pop-up Blocker** and select **Turn Off Pop-up Blocker**.



## Getting Started - TrackOne Navigational Training

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.

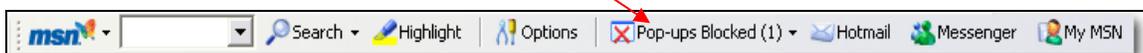


5. Proprietary toolbars (e.g., MSN, Google, and Yahoo) all have built-in pop-up blockers. For each toolbar, you will want to allow pop-ups from the site running TrackOne.

### 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. 



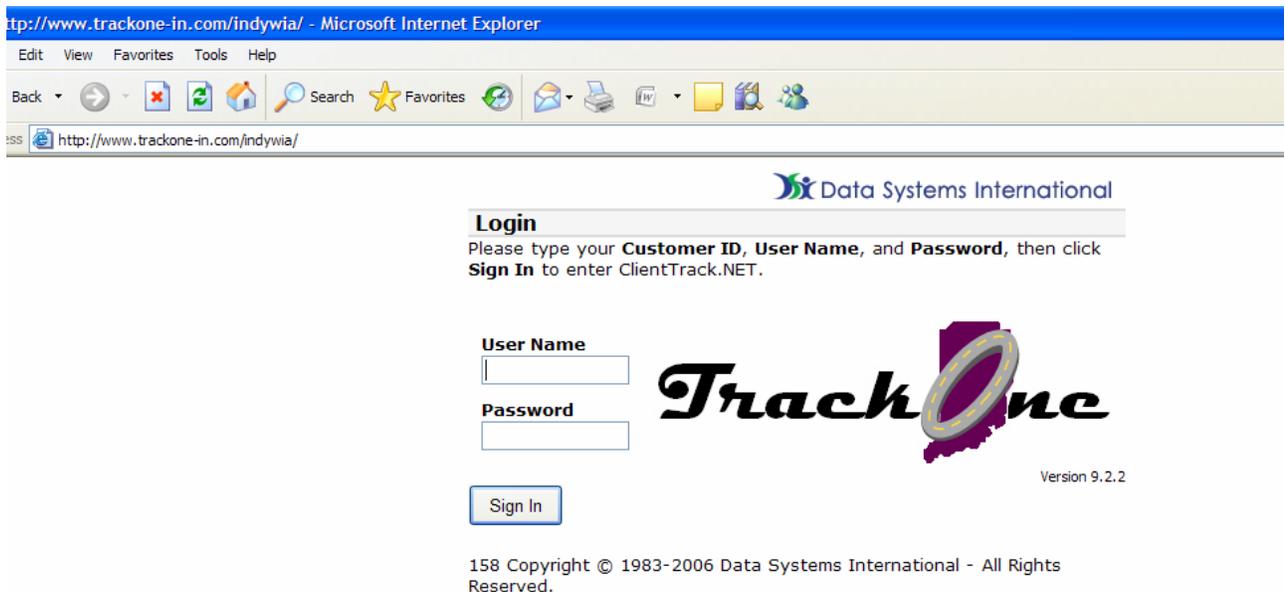
2. The button text will change to read "**Allow site pop-ups**," indicating that the Pop-up Blocker is disabled on the site in question.

### A note on security

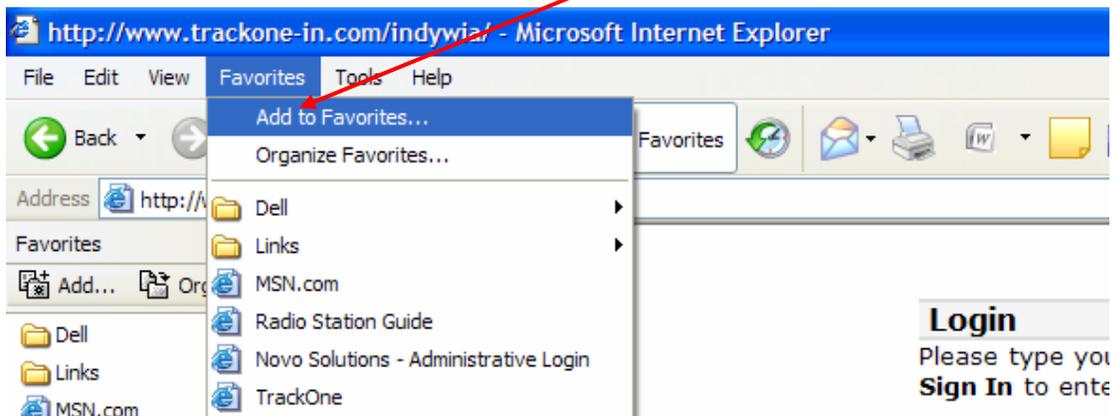
Any application is susceptible to hacking. We have taken every measure to secure TrackOne and there are no known holes. Users should use standard desktop security measures, including virus scanning, personal firewall, and malware scanner.

## 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.

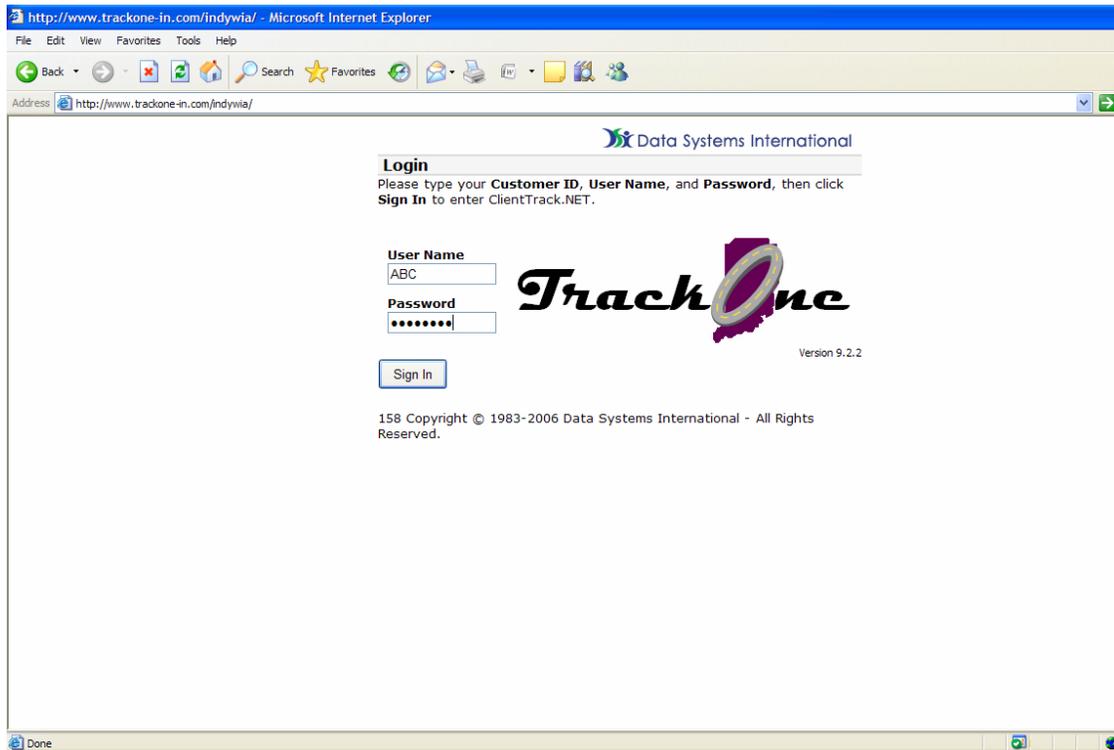


You can also save TrackOne to your Internet Explorer **Favorites** or create a shortcut on your desktop for quick access.



## 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.

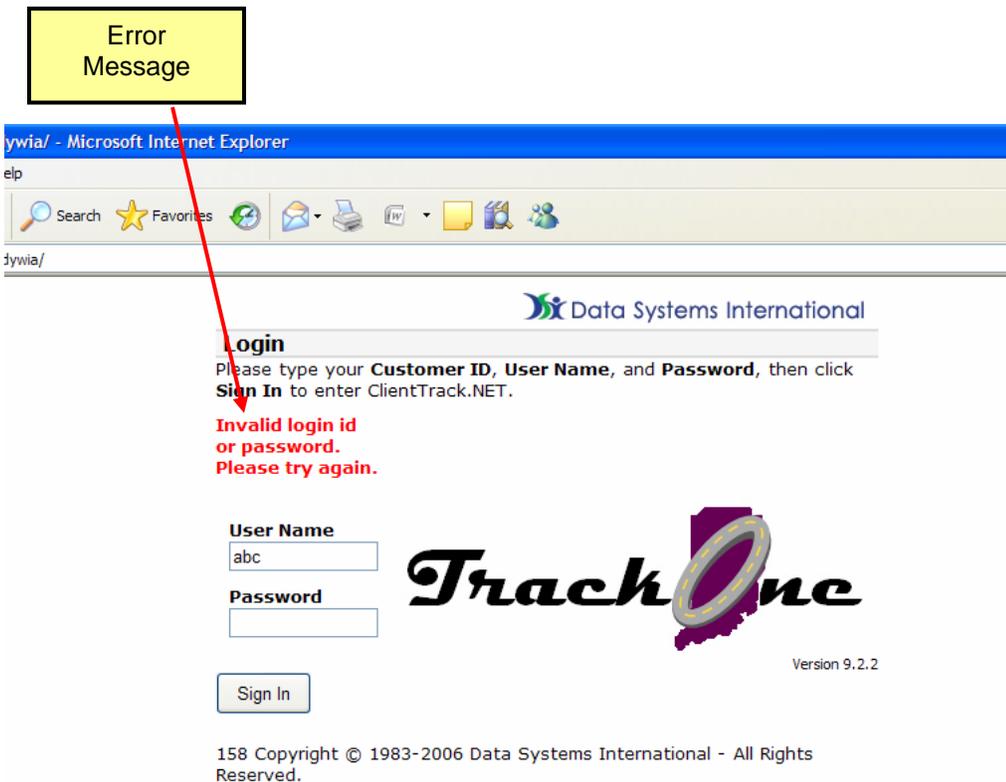
**NOTE: Keep the login window open while working with the application.**

## 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.

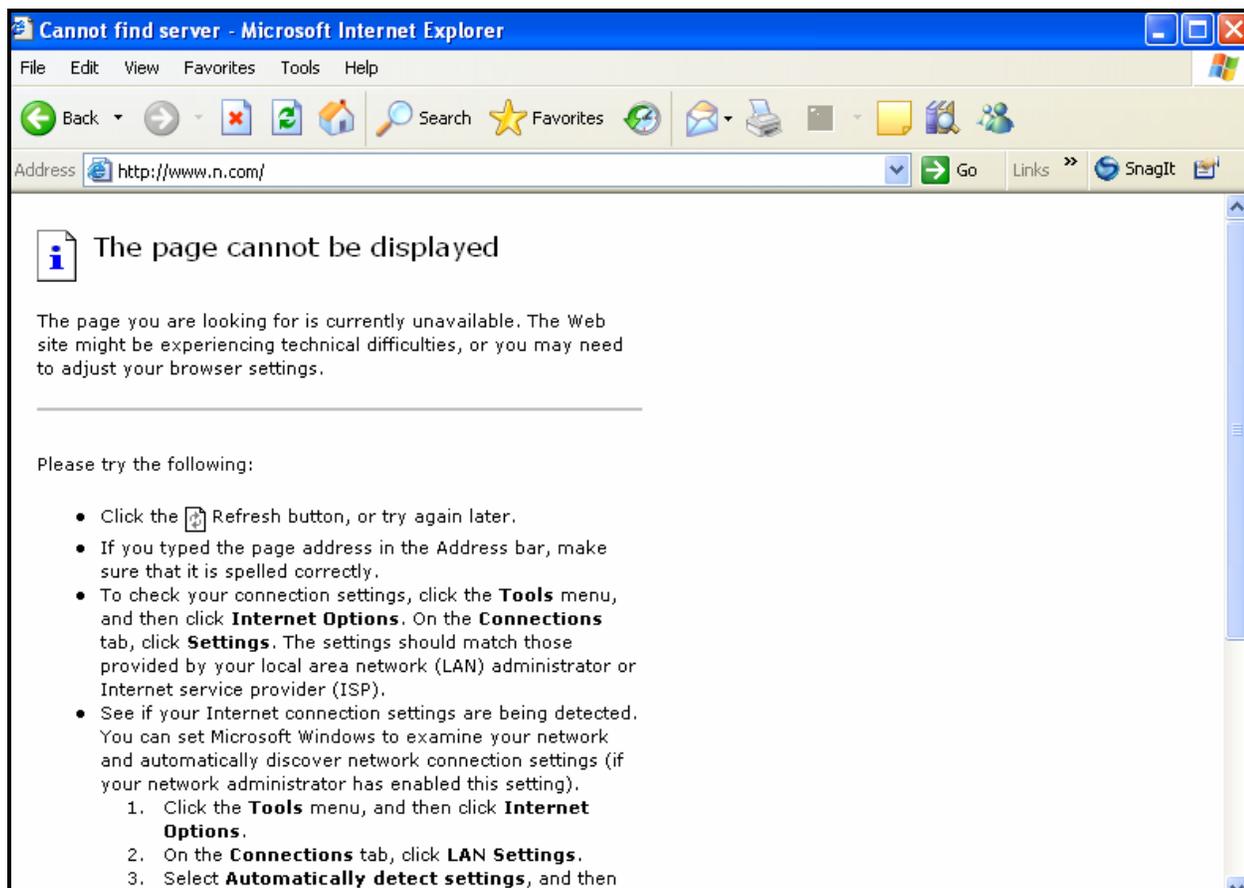
## Troubleshooting

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**.

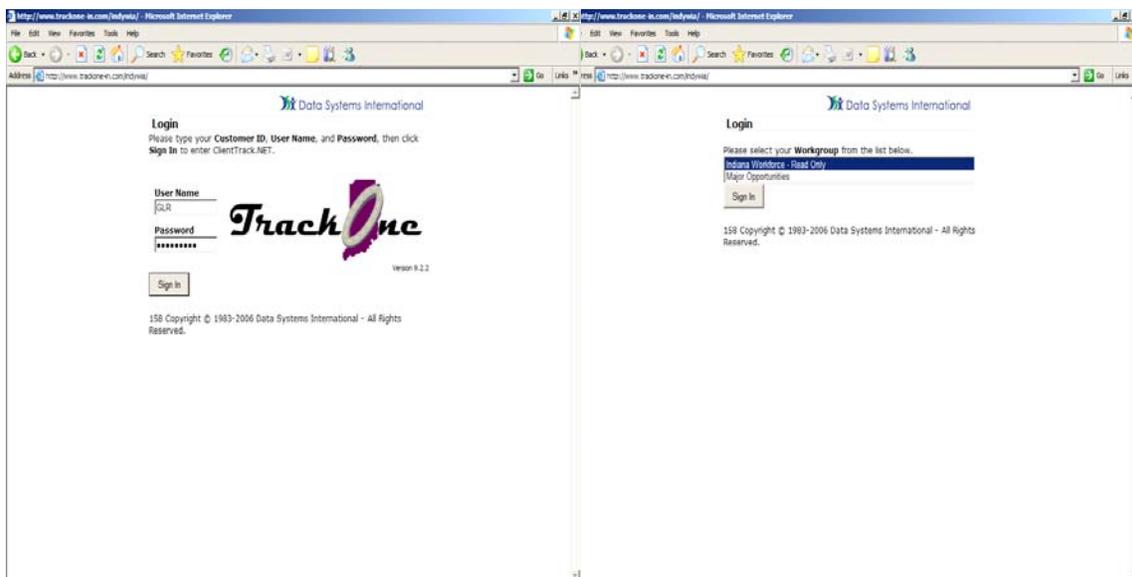


## Basic Navigation

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).



## Basic Navigation - TrackOne Navigational Training

The screenshot displays the TrackOne web application interface. At the top, the browser address bar shows the URL: <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=...>. The page header includes the TrackOne logo, the @Work Solutions logo, and the user's name and role: Ken Davidson - IndyWIA SP2 Test. There are also links for Help Topics, About DSI, and Logout. Below the header is a navigation bar with tabs for User Home and Case Management. The left sidebar contains a list of TrackOne Options, including User Home Page, Bulletin Board, Recent, Tasks, Calendar, Case Load, My User Configuration, and Paused Operations. The main content area shows a welcome message for Ken Davidson, a Global News section, and a news item from the Indiana Dept. of Workforce Development. A prominent blue banner reads: \*\*\* NEW INFORMATION POSTED Thursday, 11/15/2007 \*\*\*. Below this is a text block titled "New Pick List Values for Credentials in TrackOne:" which contains information about updates to the Credential Type pick list, including Blue and Gold WorkKeys Certificates and Master's Degree and PhD. It also mentions a new TTGB posted on the DWD website and provides contact information for Jason at the Help Desk. The bottom section shows an Alerts table with columns for Priority, Status, Type, Begin Date, and Description, and a dropdown menu for Active Case Manager Assignments.

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.

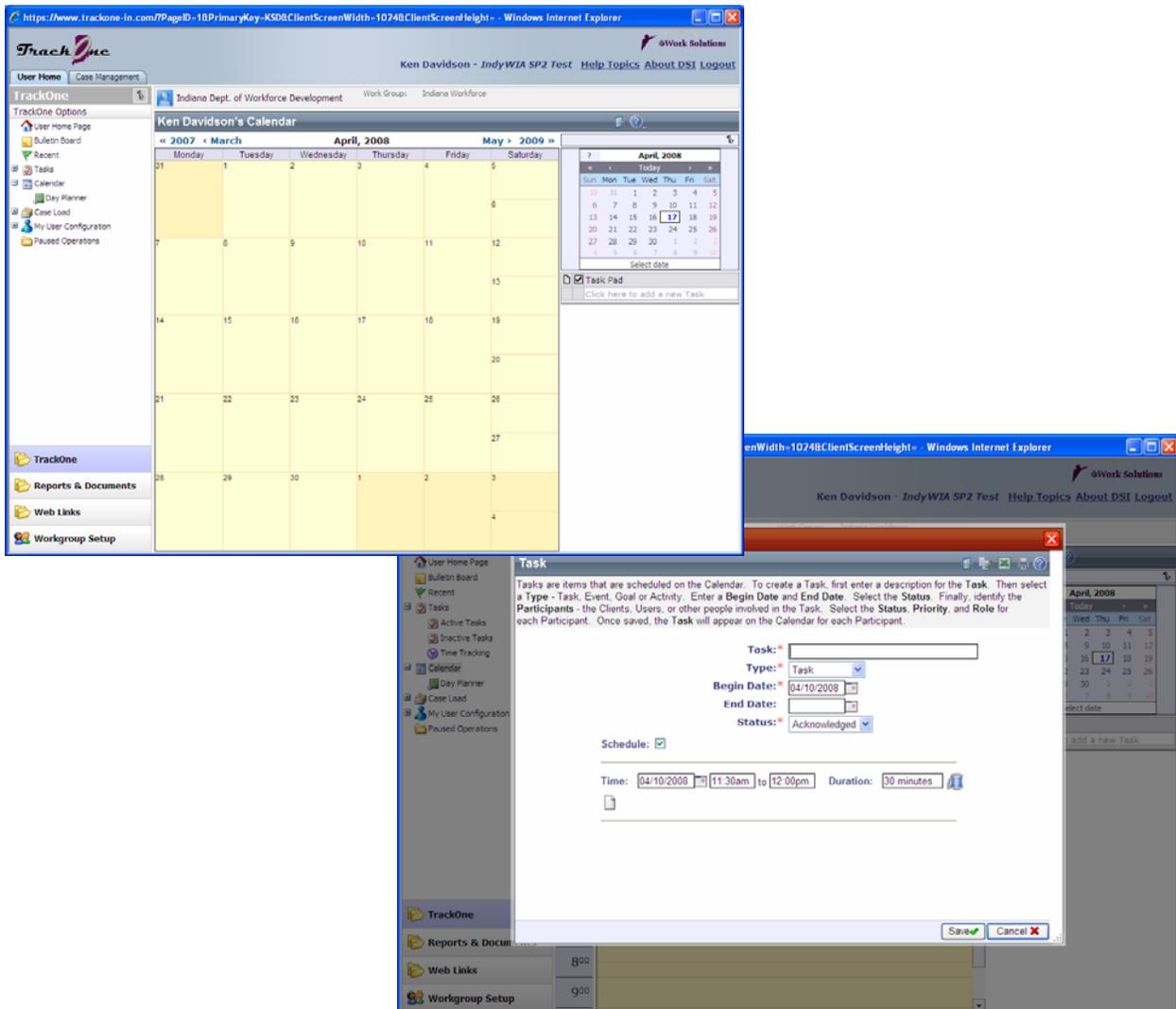
## Calendar

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**.



## Basic Navigation - TrackOne Navigational Training

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.

The screenshot displays the TrackOne web application interface. The browser address bar shows the URL: <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=...>. The application header includes the TrackOne logo, the user name "Ken Davidson - IndyWIA SP2 Test", and navigation links for "Help Topics", "About DSI", and "Logout".

The main interface is divided into several sections:

- Left Navigation Menu:** Contains "TrackOne Options" with sub-items like "User Home Page", "Bulletin Board", "Recent", "Tasks" (Active, Inactive, Time Tracking), "Calendar" (Day Planner, Case Load), "My User Configuration", and "Paused Operations". Below this are folders for "TrackOne", "Reports & Documents", "Web Links", and "Workgroup Setup".
- Header:** Shows "Indiana Dept. of Workforce Development" and "Work Group: Indiana Workforce".
- Calendar View:** Titled "Ken Davidson's Calendar", it shows a daily view for "Thursday, April 10". The time slots range from 8:00 to 9:00 PM.
- Task Pad:** Located on the right side, it features a "Task Pad" checkbox and a text input field with the prompt "Click here to add a new Task".
- Calendar Widget:** A small calendar for "April, 2008" is visible, with the date "17" highlighted.

## 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

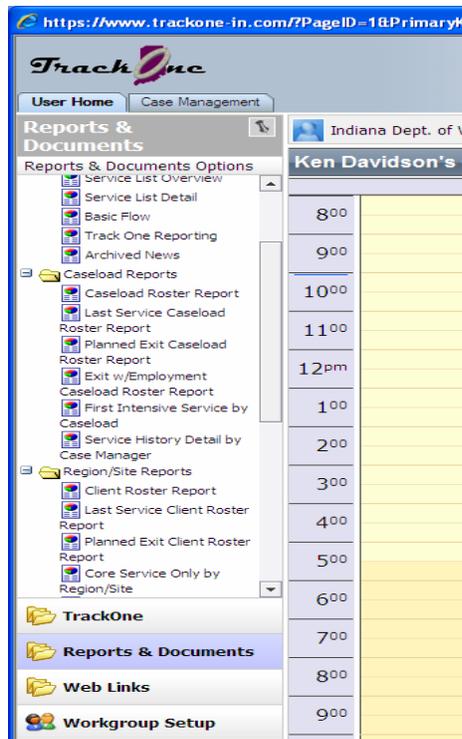
Details about the TrackOne reports are located on the DWD TrackOne website through the following link:

[http://www.in.gov/dwd/partners/TrackOne/to\\_TrackOneReportsDefined.pdf](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.



## Basic Navigation - TrackOne Navigational Training

### 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:

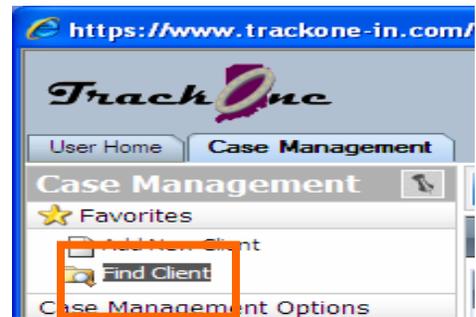
- [DWD](#): This is the DWD website, which has valuable links for clients and staff.
- [CS3](#): This is the Internet version of DWD’s Job Search and Match system.
- [Selective Service Registration](#): Even though there has not been a draft for many years, males between the ages of 18 and 25 or males 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.

The screenshot displays the TrackOne web application interface. The browser address bar shows the URL: <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=>. The page title is "TrackOne" and the user is logged in as "Ken Davidson - IndyWIA SP2 Test". The navigation pane on the left includes "User Home" (selected) and "Case Management". Under "Web Links", there is a list of links: DWD Website, CS3, Selective Service Registration, Selective Service Verification, Dept of Labor - ETA, DWD O\*Net Database, and TrackOne Tech Guidance/Resources. The main content area features the "IN.gov" logo, a search bar, and a navigation menu with categories like "About Indiana", "Agriculture & Environment", "Business & Employment", "Education & Training", "Family & Health", "Law & Justice", "Public Safety", "Taxes & Finance", and "Tourism & Transportation". A large banner for the "Indiana Department of Workforce Development" is visible, with the text "Growing Hoosier Employment and Personal Income" and a "learn more" button. Below the banner, there is a "Latest Headlines & Events" section featuring a "JAG Indiana" article titled "JAG program prepares students for life after high school".

## 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

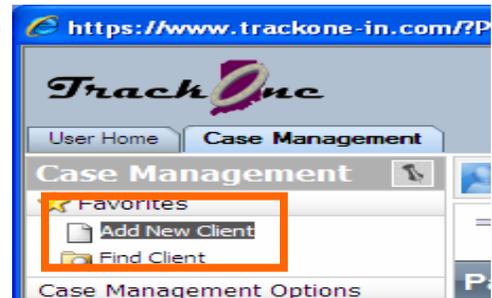
A client's SSN is still run against UI to gather the wage information prior to the common participation date. A client's SSN is run against UI to determine "Entered Employment", wages post program to calculate the average earnings and to determine employment retention. A client will be in the common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

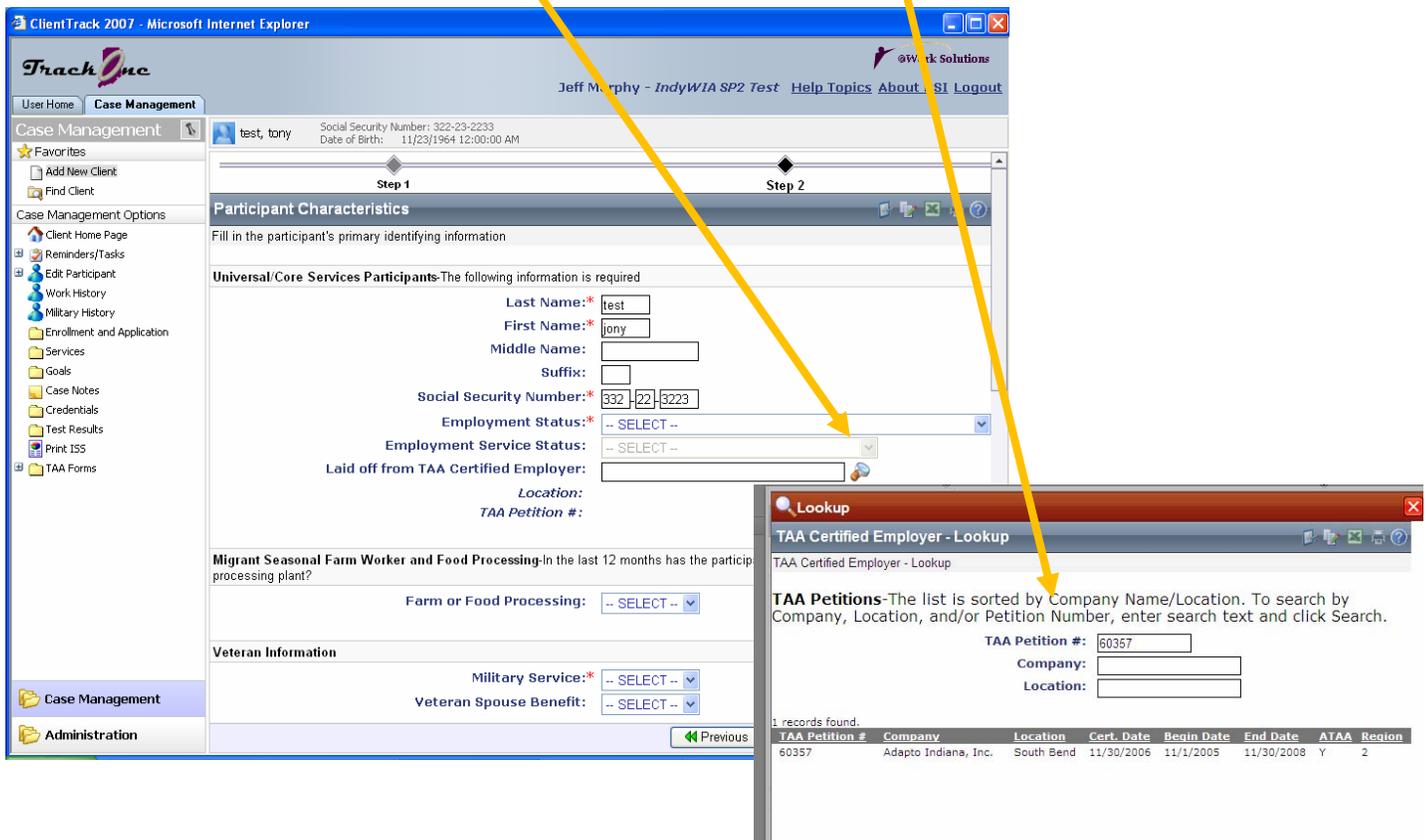
Enter the **Participant Identification** information and click the **Next** button.

The step bar identifies where you are in the continuum

A screenshot of the TrackOne web application interface showing the 'Participant Identification' form. The browser address bar shows 'https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight= - Windows Internet Explorer'. The page title is 'TrackOne'. There are two tabs: 'User Home' and 'Case Management'. The 'Case Management' tab is active. Below the tabs, there is a 'Case Management' header. A 'Favorites' section is visible, containing two items: 'Add New Client' and 'Find Client'. Below the favorites, there is a 'Case Management Options' section. The main content area is titled 'Participant Identification' and contains the following text: 'Fill in the information to identify your participant in the boxes below.' Below this text, there are four input fields: 'Last Name:\*', 'First Name:\*', 'Social Security Number:\*', and 'Birth Date:'. The 'Social Security Number' field is formatted with dashes and boxes. Above the input fields, there is a step bar with two steps: 'Step 1' and 'Step 2'. 'Step 1' is currently selected, indicated by a diamond shape. A red arrow points from the text 'The step bar identifies where you are in the continuum' to the 'Step 1' bubble in the step bar.

## Find / Add Client - TrackOne Navigational Training

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.



The screenshot displays the TrackOne web application interface. The main window shows the 'Participant Characteristics' form, which is divided into two steps: Step 1 and Step 2. The form includes fields for Last Name, First Name, Middle Name, Social Security Number, Employment Status, and Laid off from TAA Certified Employer. The 'Laid off from TAA Certified Employer' field has a magnifying glass icon next to it. A 'Lookup' dialog box is open, showing search criteria for TAA Certified Employer. The dialog box includes fields for TAA Petition #, Company, and Location. Below the dialog box, a table shows the search results.

TAA Petition #	Company	Location	Cert. Date	Begin Date	End Date	ATAA	Region
60357	Adapto Indiana, Inc.	South Bend	11/30/2006	11/1/2005	11/30/2008	Y	2

## 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**.



## 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.

https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=... - Windows Internet Explorer

TrackOne @Work Solutions

Ken Davidson - IndyWIA SP2 Test Help Topics About DSI Logout

User Home Case Management

Case Management

test, tony Social Security Number: 322-23-2233 Date of Birth: 11/23/1964 12:00:00 AM

Client Work History

The client's current and prior work history information displays below. To add a new work history record, click **Add New**. To edit or view an existing record, click **Action** on the left of the record you want to change, and then click **Edit**. To view the work history journal for a specific employment record, click **Action**, then **View Journal**.

0 records found.

Employer	Start Date	End Date	Job Title	Wage
----------	------------	----------	-----------	------

Add New Cancel

Work History

### 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.

https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=... - Windows Internet Explorer

TrackOne @Work Solutions

Ken Davidson - IndyWIA SP2 Test Help Topics About DSI Logout

User Home Case Management

Case Management

test, tony Social Security Number: 322-23-2233 Date of Birth: 11/23/1964 12:00:00 AM

TrackOne Work History

Step 1 Step 2

Work History - Employer Info

Identify the current or prior employer for the client by typing in the employer information or selecting a local employer using the lookup.

Employer:

Address:

ZIP Code:

City:

State:

## Work History – TrackOne Navigational Training

### 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.

The screenshot displays the TrackOne Case Management interface in a Windows Internet Explorer browser window. The URL is <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=>. The user is logged in as Ken Davidson - IndyWIA SP2 Test. The interface shows a sidebar with navigation options like 'Case Management' and 'Administration'. The main content area is titled 'Case Management' and displays the following form fields:

- Hourly Wage\*:
- Average Weekly Hours\*:
- Job Title\*:
- Description:
- Duties/Responsibilities:
- Job Start Date\*:
- Job End Date:
- Reason Left:
- Commission:
- Classification\*:
- Contact Name:
- Contact Phone:
- Placement Type\*:
- Benefits Available:
- Job Covered by UI:
- O\*NET Code:
- O\*Net Title:
- Industry Group (NAICS):
- Non-Traditional Employment:
- Job Related to Training:
- Verified Employment:

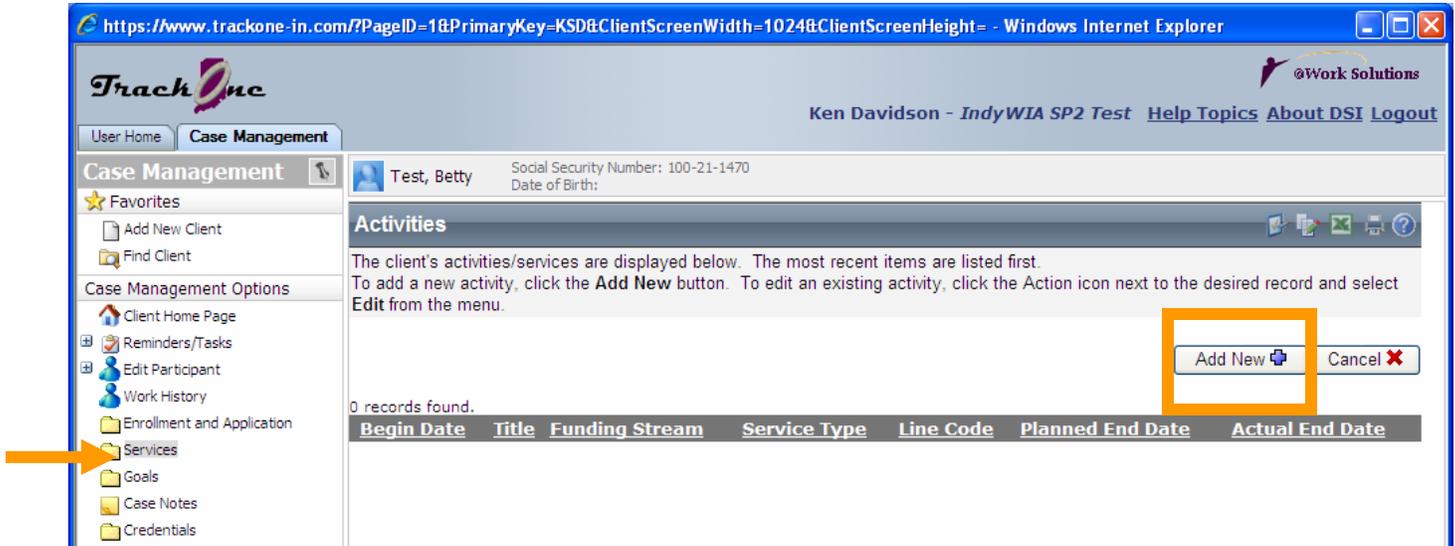
At the bottom of the form, there are four buttons: 'Previous', 'Finish', 'Pause', and 'Cancel'.

### 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.

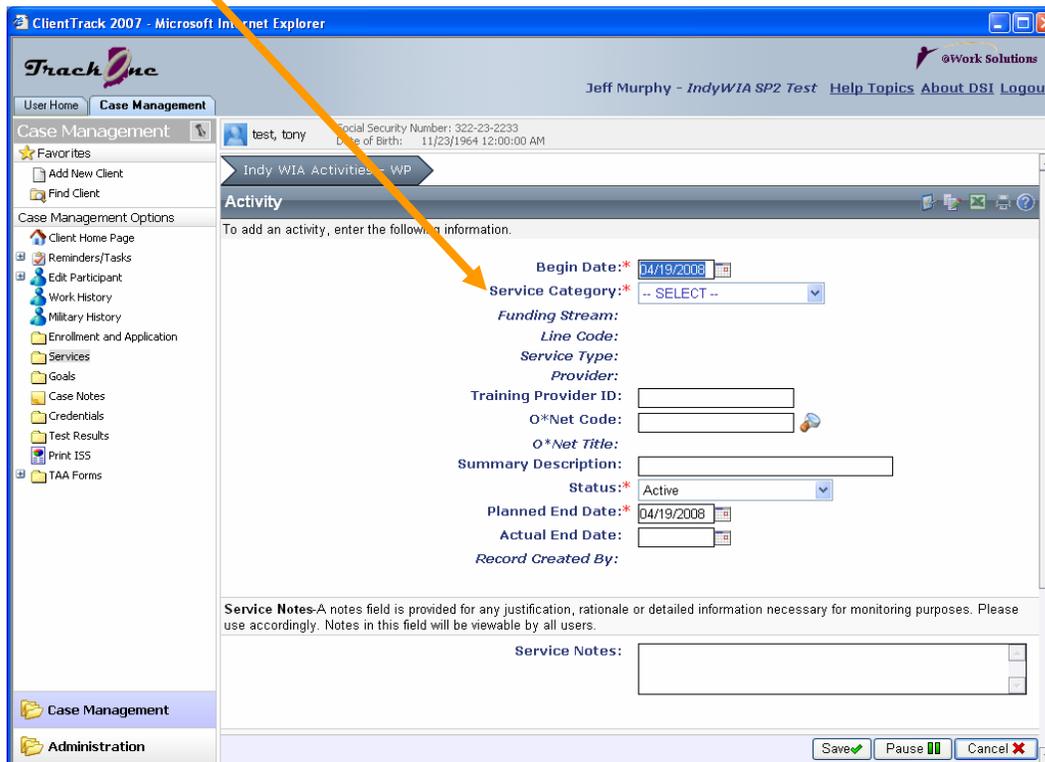
## Add 1<sup>st</sup> Core Service

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.



## 1<sup>st</sup> Core Service – TrackOne Navigational Training

The “**Service Category**” choices are shown on the right.

Since this is the 1<sup>st</sup> Core Service select “1 Informational / Self-Service.”

**Activity**

To add an activity, enter the following information.

Begin Date:\* 04/07/2008

Service Category:\* -- SELECT --

Funding Stream:

Line Code:

Service Type:

Provider:

Begin Date: 04/07/2008

Service Category:\* -- SELECT --

- SELECT --
- 1 Informational/Self-Service
- 2 Staff-Assisted
- 3 Training Services
- 4 TAA Specific Services
- 6 Supportive Services
- 8 Partner Services
- 9 Follow Up
- WIRED Services

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

**Activity**

To add an activity, enter the following information.

Begin Date:\* 04/07/2008

Service Category:\* 1 Informational/Self-Service

Activity/Service Title:\*

Funding Stream:

Line Code:

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.

**Lookup**

Available Services for Selected Category

Click **Search** to display a list of available services for the selected Category. Use the optional **Service Type** and **Funding Stream** (only the ones for which this client is currently eligible are shown) to narrow the search. The **Service Title** box can be used to match all titles containing the text in the box.

Click on an item in the list to place the client into the selected service.

Service Type: WP&Vets Info Self Service

Funding Stream: Wagner-Peyser

Service Title:

25 records found.

Funding Stream	Service Type	Service Title	Line Code
Wagner-Peyser	WP&Vets Info Self Service	Referred on a Job Order	
Wagner-Peyser	WP&Vets Info Self Service	Referred on a Job Order-Applicant Initiated	
Wagner-Peyser	WP&Vets Info Self Service	Call-in on a Job Order	
Wagner-Peyser	WP&Vets Info Self Service	ES Applicant Status-Partial Registration	
Wagner-Peyser	WP&Vets Info Self Service	Job Search Activity-Automated Labor Exchange	
Wagner-Peyser	WP&Vets Info Self Service	ES Applicant Status-Complete Registration	
Wagner-Peyser	WP&Vets Info Self Service	Self-Registration in CS3	
Wagner-Peyser	WP&Vets Info Self Service	Received Job Search Planning	
Wagner-Peyser	WP&Vets Info Self Service	Participated in Job Club	
Wagner-Peyser	WP&Vets Info Self Service	Resume Prep Assistance	
Wagner-Peyser	WP&Vets Info Self Service	Participated in Job Search Workshop	

Search Cancel

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.

The **Status** field defaults to **Active**. If this is a one day service, make sure you change it to **Completed**. Once this is done the **Actual End Date** becomes a required field.

You may choose to enter a brief service note; however, this is not required.

**Note:** Service notes **DO NOT** replace the need to write a detailed case note.

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.

### 1<sup>st</sup> Core Service – TrackOne Navigational Training

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

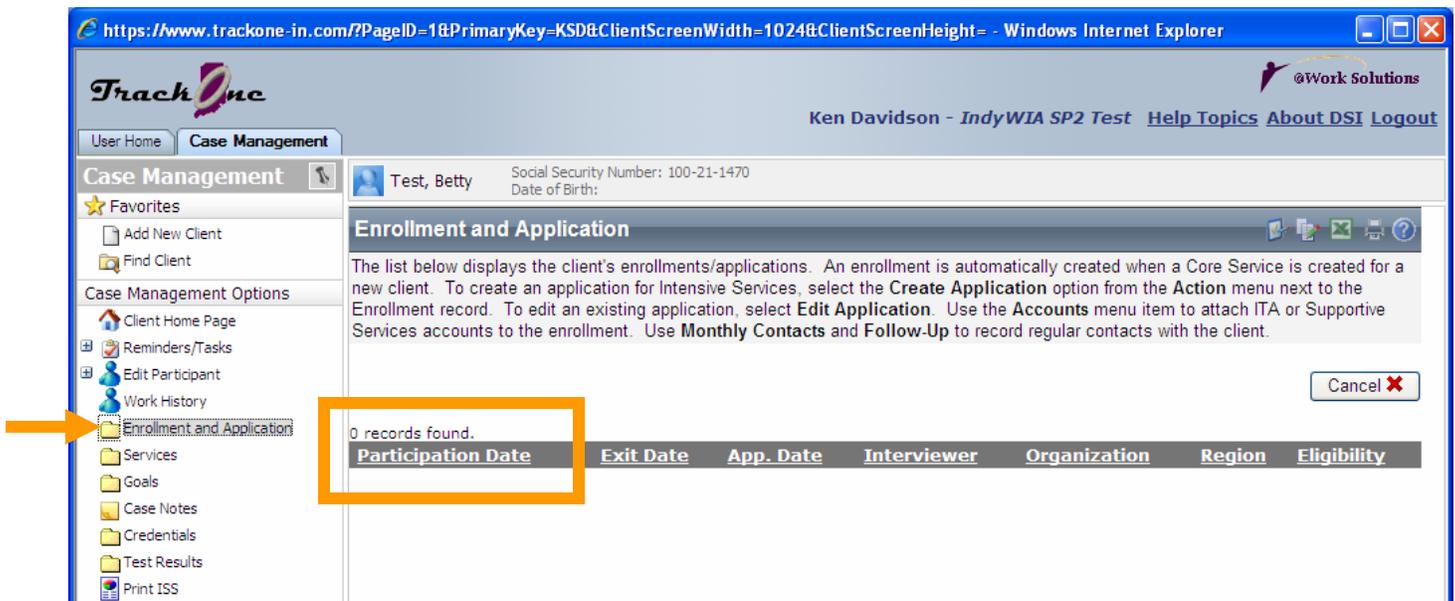
The following section will give a quick overview of how to read the **Enrollment and Application** summary screen.

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.



## 1<sup>st</sup> 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 1<sup>st</sup> 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.

The screenshot shows the TrackOne web application interface. The browser address bar displays the URL: <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=>. The page header includes the TrackOne logo, the user name "Ken Davidson - IndyWIA SP2 Test", and links for "Help Topics", "About DSI", and "Logout".

The main content area is titled "Enrollment and Application" and displays the following information for the client "test, tony":

- Social Security Number: 322-23-2233
- Date of Birth: 11/23/1964 12:00:00 AM

The enrollment record shows:

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
2/9/2008						

A context menu is open over the enrollment record, listing the following actions:

- Edit Registration
- Create Application
- Monthly Contact
- Follow Ups
- Exit Information
- Print App/Enrollment
- Planned Gap in Service (New)
- View Planned Gaps

## 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.

**Enrollment and Application**

The list below displays the client's enrollments/applications. An enrollment is automatically created when a Core Service is created for a new client. To create an application for Intensive Services, select the **Create Application** option from the **Action** menu next to the Enrollment record. To edit an existing application, select **Edit Application**. Use the **Accounts** menu item to attach ITA or Supportive Services accounts to the enrollment. Use **Monthly Contacts** and **Follow-Up** to record regular contacts with the client.

1 records found.

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
2/2/2008		2/2/2008	Steve Nance	Regional Operator - Region 11	11	Adult, WIRED

Cancel X

## 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.

**Enrollment and Application**

The list below displays the client's enrollments/applications. An enrollment is automatically created when a Core Service is created for a new client. To create an application for Intensive Services, select the **Create Application** option from the **Action** menu next to the Enrollment record. To edit an existing application, select **Edit Application**. Use the **Accounts** menu item to attach ITA or Supportive Services accounts to the enrollment. Use **Monthly Contacts** and **Follow-Up** to record regular contacts with the client.

1 records found.

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
	10/29/2005	4/19/2005		Vincennes - Monroe	08	Adult, TAA

Cancel X

- Follow Ups
- Exit Information
- Print App/Enrollment
- View Planned Gaps

## 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.



The screenshot shows the 'Enrollment and Application' interface. On the left is a navigation pane with 'Case Management Options' including 'Client Home Page', 'Reminders/Tasks', 'Edit Participant', 'Work History', 'Enrollment and Application', 'Services', 'Goals', 'Case Notes', 'Credentials', 'Test Results', and 'Print ISS'. The main area displays a table of enrollment records. Above the table, there is a 'Cancel' button with a red 'X' icon. The table has the following data:

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
3/7/2008		3/7/2008	Diane Evans	Interlocal Association - Madison	05	Adult, Youth
2/23/2006	8/8/2006	2/23/2006		JobWorks - Grant WorkOne Express	03	Adult, Youth

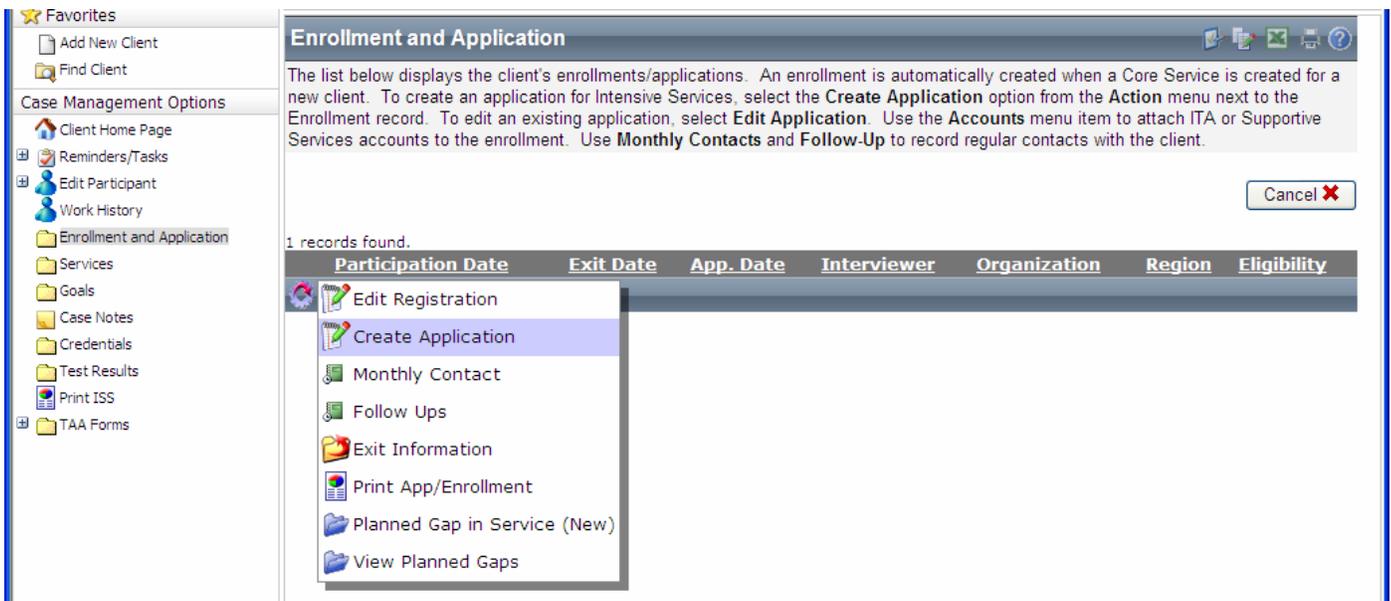
In this example, the client had already received services from 2/23/2006 to 8/8/2006 and was soft-exited. The client came back into the program in 2008 which requires a new enrollment and a new application.

## Creating an Application

Once the 1<sup>st</sup> 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.

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: test, tony  
 Address:\* test address  
 Zip Code:\* 46234  
 City:\* Clermont  
 State:\* IN  
 County:\* Marion  
 Home Phone:\* 317-343-2222  
 Birthdate:\* 11/23/1964  
 Age: 43  
 Documented By: -- SELECT --  
 Gender:  
 Social Security Number: 322-23-2233  
 Documented By: -- SELECT --  
 Citizenship:\* -- SELECT --  
 Documented By: -- SELECT --  
 Hispanic/Latino Ethnicity: No  
 American Indian/Alaskan Native:   
 Asian:   
 Black/African American:   
 Hawaiian/Pacific Islander:   
 Did Not Self-Identify Race:   
 White/Caucasian:   
 Selective Service Registration:\* Not Required  
 Documented By: -- SELECT --

Next ► Pause ||| Cancel ✖

The fields that require documentation are:

### Date of Birth

### Social Security Number

### Citizenship

### Selective Service

- SELECT --
- Baptismal Record
- Birth Certificate
- DD-214, Report of Transfer or Discharge Paper
- Driver's License
- Federal, State or Local Government ID Card
- Hospital or Birth Record
- Passport
- Public Assistance/Social Service Records
- School Records/ID Card
- Work Permit

- SELECT --
- DD-214, Report of Transfer or Discharge
- Unemployment Insurance Wage Records
- Employment Records
- IRS Form Letter 1722
- Letter from Social Services Agency
- Pay Stub
- Social Security Benefits
- Social Security Card
- W-2 Form
- Self-Verification

- SELECT --
- Birth Certificate
- Alien Registration Card
- US Passport
- Acceptable I-9 Documentation
- Public Assistance Records
- DD-214, Report of Transfer or Discharge with Place of Birth ...
- Food Stamp Records
- Foreign Passport Stamped Eligible to Work
- Hospital Record of Birth
- Native American Tribal Document
- Naturalization Certification
- Baptismal Record with Place of Birth Shown
- Department of Corrections Record indicating Citizenship

- SELECT --
- Acknowledgement Letter
- Contact Selective Service
- DD-214, Report of Transfer or Discharge
- Local/State Registration Process
- Selective Service Advisory Opinion Letter
- Selective Service Registration Card
- Selective Service Registration (Form 3A)
- Selective Service Verification Form
- Stamped Post Office Receipt of Registration

## 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.

**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

**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.

**Client Work History**

The client's current and prior work history information displays below. Click on the desired record to select it.

0 records found.

Employer	Start Date	End Date	Job Title	Wage
----------	------------	----------	-----------	------

**Add New**

**Add New**

Step 1

**Work History - Employer Info**

Identify the current or prior employer for the client by typing in the employer information or selecting a local employer using the lookup.

**Employer:**

**Address:**

**Add New**

Step 2

**Work History - Job Information**

Fill in the information below regarding the client's job. The wage information is based on the wage the client was receiving at the time they started the job.

**Hourly Wage:**\*

**Average Weekly Hours:**\* 40.00

**Job Title:**\*

**Description:**

**Duties/Responsibilities:**

**Job Start Date:**\*

**Job End Date:**\*

**Reason Left:** -- SELECT --

**Commission:**

**Classification:**\* -- SELECT --

**Contact Name:**

## Dislocated Worker Category

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

### No 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

Note the fields that are originally required

### 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.

## Creating An Application – TrackOne Navigational Training

### 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.

TAA-For TAA, a certified employer must be selected below. This should match the Employer at Dislocation above.

**Laid off from TAA Certified Employer:**  

**Company Location:**

**TAA Petition Number:**

---

**Farm Worker**-Have you worked in farming or food processing in the last 12 months?

**Farming Last 12 Months:\***  Yes  No

**Primarily Employed in Farm Work:**

- During the last 12-months, received at least 50% of total earned income from qualifying farm work.
- During the last 12-months, was employed at least 50% of total work time in qualifying farm work.
- Met both of the conditions described above.
- Does not meet any one of the conditions described above.
- Participant does not disclose the necessary information.

**Minimum Threshold of Farm Work Performed:**

- During the last 12-months, worked at least an aggregate of 25 or more days or parts of days in qualifying farm work.
- During the last 12 months, earned at least \$800 in qualifying farm work.
- Met both of the conditions described above.
- Does not meet any one of the conditions described above.
- Participant does not disclose necessary information.

**Migrant Status:**

- Had to travel to a job site that is far enough away from his or her permanent residence that they cannot return to their residence within the same day.
- Does not meet the condition described above.
- Participant does not disclose necessary information.

**Type of Qualifying Farm Work:**

### 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.

**Application - Other Client Information**

Please complete the following information

Family Status: Single

**Dependent**-Are you primarily responsible for a dependent child under the age of 18?

Responsible for Dependent: Yes

If yes then are you?: Single

Foster Parent:

Grandparent with custody of grand child(ren):

**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. **Family income is a mandatory item for WP.**

Number In Family: 2

Family Income for previous 6 Months: 6000.00

Homeless:

Foster Child:

Township Trustee Assistance:

Food Stamps: Receiving

TANF:

TANF Exhaustee:

General Assistance:

Refugee Cash Assistance:

SSI-SVA Title XVI:

Low Income:

Previous Next Pause Cancel

#### 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.

**Education Information**-Please identify the level of the client's education. NOTE: For Youth Reading and Math assessment, go to Test Results on the Case Management menu to enter test scores.

Education Status (Required for Youth Only): -- SELECT --

Highest Grade Completed:\* Completed 12th Grade and Attained HS Diploma

In School (Required for WP): Yes

## 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.

**Military Service Information**-Indicate the applicant's military service status by completing the following. If Yes then add a military service record using the Add New button.

Military Service:\* -- SELECT --

Veteran-Spouse Benefit: -- SELECT --

If Yes, then...

**Military Service Information**-Indicate the applicant's military service status by completing the following. If Yes then add a military service record using the Add New button.

Military Service:\* Yes

Most Recent Military Service (Select): 

Branch:

Start Date:

End Date:

Discharge Type:

Disabled Veteran: -- SELECT --

Veteran-Spouse Benefit: -- SELECT --

Previous Next Pause Cancel

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."

**Military Service Information**-Indicate the applicant's military service status by completing the following. If Yes then add a military service record using the Add New button.

Military Service:\* Yes

Most Recent Military Service (Select): 

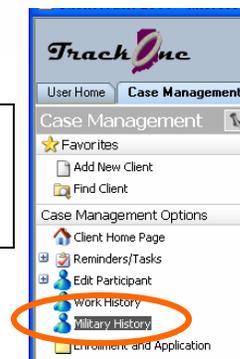
Select Latest Military Service

Add New + Cancel X

0 records found.

Start Date	Release Date	Component	Branch	Discharge Type
------------	--------------	-----------	--------	----------------

**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.

**Add New**  
**Military History**

Are you still active?:\* Yes  
Branch of Service:\* Air Force  
Component: Air National Guard  
Title 10 Activation: Yes  
Date Entered the Service:\* 01/01/2002  
Release Type:\* Separation  
Date of Discharge:\* 08/01/2006  
Type of Discharge: Honorable  
Recent Separated:   
Service Connected Disability: Yes

**VA Disability Rating**-Select the most appropriate percentage rate. 0% to 20% is Disabled Vet. 30%+ is Special Disabled Vet.

Disability Rating: 30%  
Disabled Vet:   
Special Disabled Vet:   
Campaign Badge:   
Military Occupational Speciality:   
Pay Grade:   
Rank:

Save Cancel

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

**Military Service Information**-Indicate the applicant's military service status by completing the following. If Yes then add a military service record using the Add New button.

Military Service:\* Yes  
Most Recent Military Service (Select): Air National Guard  
Branch: Air Force  
Start Date: 1/1/2002  
End Date: 8/1/2006  
Discharge Type: Honorable  
Disabled Veteran: Yes, Special disabled  
Veteran-Spouse Benefit: Yes

Previous Next Pause Cancel

**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.

Enrollment and Application-General

Step 1 Step 2 Step 3 Step 4 Step 5

### Application - Barriers

Please indicate any barriers the client may have.

**Note:** Poor Work History, Disability, and Locally Defined Barriers do not qualify applicants for WIA Youth services (except under the 5% provision).

**Disabled:\*** No

**Poor Work History:**

**Locally Defined Barrier:**

**Local Barrier Description:**

**WIA Youth Barriers**-Any of the barriers listed below will qualify low-income youth for WIA Youth. (Basic Skills Deficiency is calculated from reading and math scores entered in Test Results.)

**Basic Skill Deficient:**

**Limited English:**

**Substance Abuse:**

**Offender:**

**Pregnant/Parent Youth:**

**Youth-Needs Assistance:**

**Runaway:**

**High School Dropout:**

Previous Next Pause Cancel

## Step 5 – Eligibility

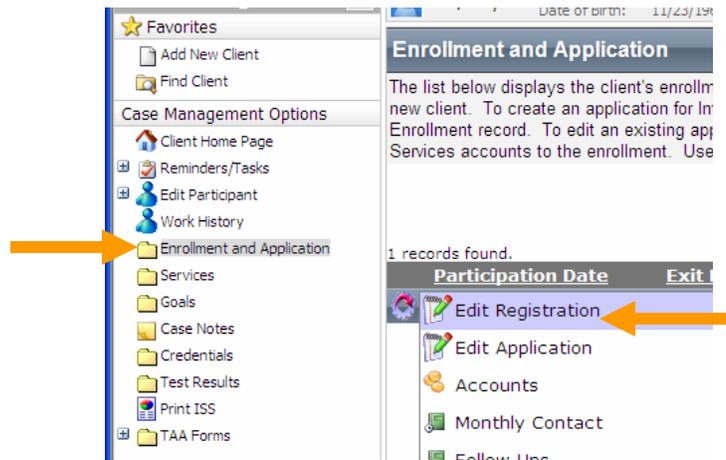
Once all of the required and optional fields are completed to the best of your ability, click the **Calculate Eligibility** button and the system will auto-fill the checks in the boxes next to the programs for which the participant is eligible. Check the boxes closely to see if the participant is showing 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 eligibility, and click **Finish**:

Participation Date	Exit Date	App. Date	Interviewer	Organization	Region	Eligibility
2/9/2008		2/9/2008	Ken Davidson	At Work Solutions		Adult

## 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.

TrackOne Registration	
<b>Participation Dates</b> -The first and last service dates are displayed below. If no services/activities occur for 90 days, the participant will be automatically exited as of the Last Service Date. If a Planned Gap in Service is in effect, no exit will occur before the 'Hold Open Until' date shown below.	
Participation Date:	2/9/2008
First Training Service:	
Last Service Date:	2/9/2008
Hold Open Until:	
Actual Exit Date:	
<b>Program Participation</b> -The date of the first funded service for each grant program for this participant is shown below. Participants are counted in performance measures for each program from which services are received.	
First Funded Service - WIA Adult:	
First WIA Dislocated Worker:	
First WIA Youth:	
First Rapid Response:	
First National Emergency Grant:	
First Trade Adjustment Act (TAA):	
First DVOP:	
First LVER:	
First Wagner-Peyser (WP):	
First WOTC:	

**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 Tracking**-This section for TAA program use ONLY.

TAA Petition Number: \_\_\_\_\_

TAA Application Date:

TAA Participant ID:

Eligible for ATAA:

Training Waiver/Reason: -- SELECT --

Training Program ID:

Training Contract Review Date:

Total Cost of Training:

Total Expenses Paid by TAA:

Total Travel Expenses Paid:

Total Subsistence Expenses Paid:

Total Other Expenses Paid:

TAA Deregistration Notice:

Other Federal Enrollment code: \_\_\_\_\_

---

**TAA - Employment at Dislocation**

Separation Date:

Annual Pay:

# of Months Employed:

Recalled by Former Employer:

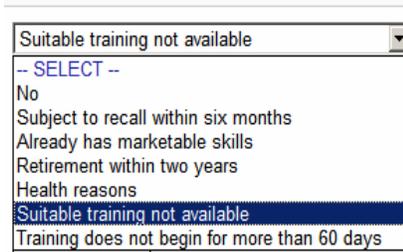
**TAA Application Date:** Check to ensure that the **TAA Application Date** is accurate. If the participant is dually enrolled in WIA and TAA, the WIA and TAA application dates will be the same.

**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.



Suitable training not available

-- SELECT --

- No
- Subject to recall within six months
- Already has marketable skills
- Retirement within two years
- Health reasons
- Suitable training not available**
- Training does not begin for more than 60 days

**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.

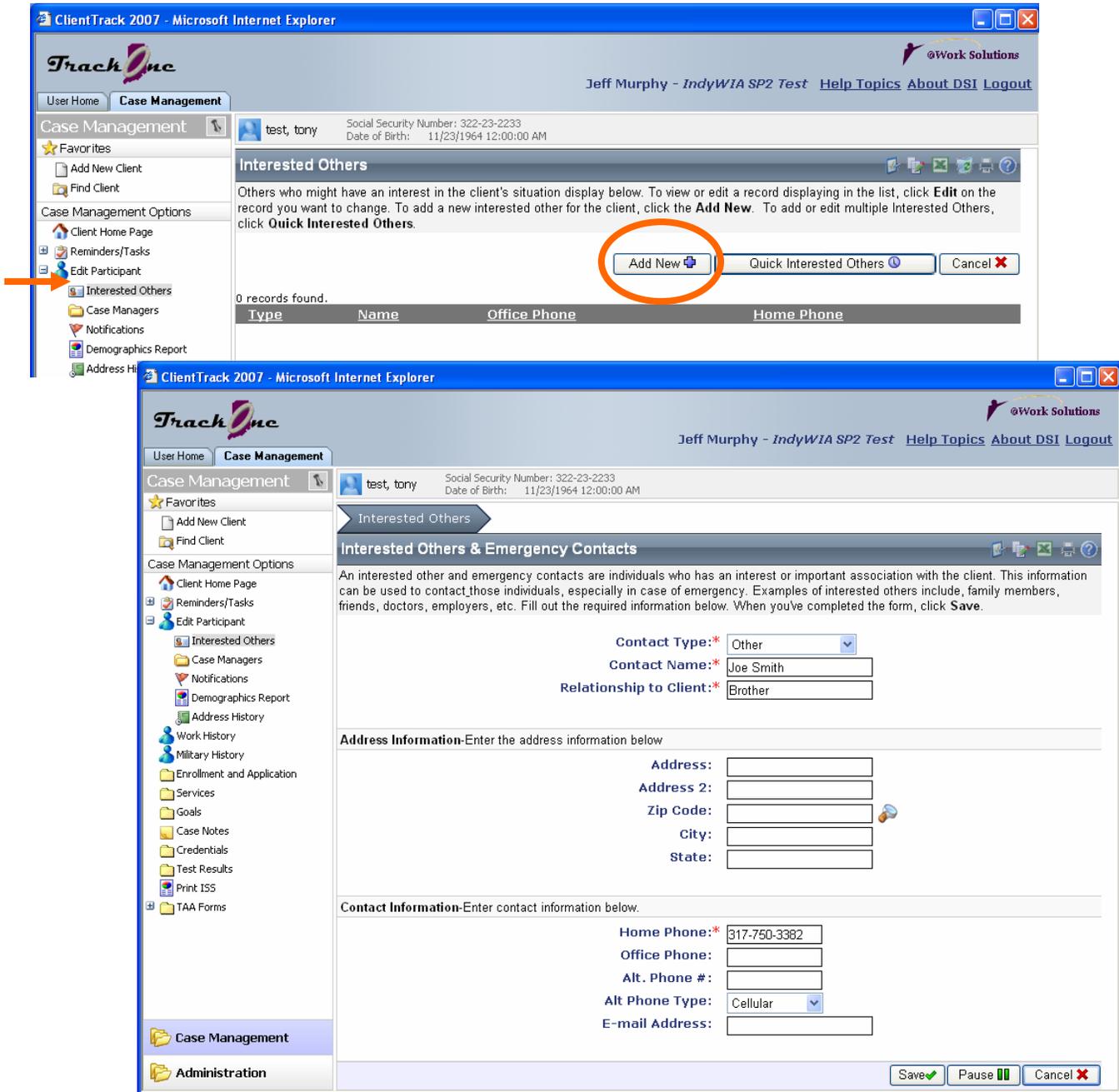
Enter the number of months the participant worked for this employer.

**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.



## 1<sup>st</sup> 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 **1<sup>st</sup> 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.

The screenshot displays the TrackOne Case Manager Assignment interface. The browser address bar shows the URL: <https://www.trackone-in.com/?PageID=1&PrimaryKey=KSD&ClientScreenWidth=1024&ClientScreenHeight=>. The page title is "TrackOne". The user is logged in as "Ken Davidson - IndyWIA SP2 Test". The left-hand menu is visible, with "Case Managers" highlighted. The main content area shows the "Case Manager Assignment" form with fields for "Begin Date" (04/17/2008), "End Date", "Case Manager" (Ken Davidson), "Location" (Selected Option Not in the Current List), "Enrollment" (-- SELECT --), "Language" (English), and "Status" (Active).

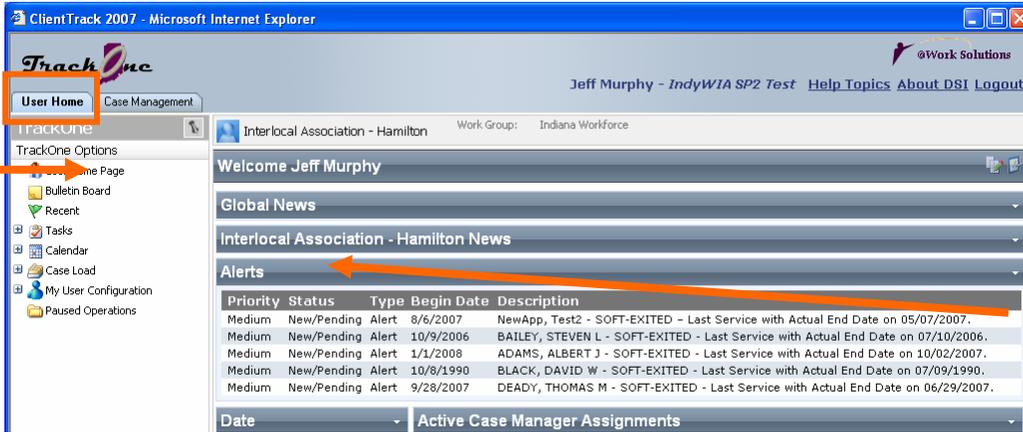
### Procedure

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.

## Alerts – TrackOne Navigational Training

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 **Reminders/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.

The screenshot shows the 'Client Tasks' interface. On the left sidebar, the 'Reminders/Tasks' option is highlighted with an orange box. An orange arrow points from the top of the page down to this menu item. The main content area displays a table of tasks with the following columns: Priority, Status, Type, Begin Date, and Description. Two tasks are listed:

Priority	Status	Type	Begin Date	Description
High	New/Pending	Alert	4/2/2007	RANDOLPH, DOROTHY A -- SOFT EXITED -- Last service on 01/02/2007.
Medium	New/Pending	Alert	3/3/2007	RANDOLPH, DOROTHY A hasn't received a service since 01/02/2007.

## 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.

**Goal**

Identify the information on the participant's individual goal.

Goals can be set up for all participants. If recording an employment goal, select the Goal Type "Employment Goal". All other goals for WIA participants (Older Youth, Adult, Dislocated Worker) or TAA participants use the "Other, Non-younger youth".

**WIA Youth Goals:** The WIA Goal Type (Basic Skills, Occupational Skills, Work Readiness) must be selected for WIA Younger Youth. Youth goals must be attained within one year; if the youth does not attain the goal within one year of the date it was set, the Status must be set to "NOT Attained." Younger Youth Skill Attainment rate is a performance measure which looks at the skills set and attained for younger youth.

**Status:** \*  Open  
 Attained  
 NOT Attained

**Goal Type:** \* -- SELECT --

**Goal:** \* -- SELECT --

**Goal Description:** [Text Box]

**Goal Date:** \* 04/17/2008 [Calendar]

**Estimated Completion Date:** [Calendar]

**Date Attained:** [Calendar]

**Explanation:** \* [Text Area]

**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**

**Status:** \*  Open  
 Attained  
 NOT Attained

**Goal Type:** \* Basic Skills Goal

**Goal:** \* -- SELECT --

**Goal Description:** -- SELECT --

**Goal Date:** \* [Calendar]

**Estimated Completion Date:** [Calendar]

**Date Attained:** [Calendar]

**Explanation:** \* [Text Area]

Reading Comprehension  
Math Computation  
Writing  
Speaking  
Listening  
Problem Solving, Reasoning  
ESL/Vocational Skills  
Life Skills

Save

**While the Occupational Skills Goal returns a different set of results**

**Status:** \*  Open  
 Attained  
 NOT Attained

**Goal Type:** \* Occupational Skills

**Goal:** \* -- SELECT --

**Goal Description:** -- SELECT --

**Goal Date:** \* [Calendar]

**Estimated Completion Date:** [Calendar]

**Date Attained:** [Calendar]

**Explanation:** \* [Text Area]

Perform Actual Tasks  
Familiarity w/ Procedures, Tools  
Technology  
Information Skills  
Other Occupational Skills Goal

Save



**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.

Lookup

Available Services for Selected Category

Click **Search** to display a list of available services for the selected Category. Use the optional **Service Type** and **Funding Stream** (only the ones for which this client is currently eligible are shown) to narrow the search. The **Service Title** box can be used to match all titles containing the text in the box.

Click on an item in the list to place the client into the selected service.

Service Type: Counseling and Career Planning

Funding Stream: WIA-Adult

Service Title:

2 records found.

Funding Stream	Service Type	Service Title	Line Code
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling - Customer Crisis/Issue	N4
WIA-Adult	Counseling and Career Planning	1-on-1 Counseling and Career Planning	N4

Search Cancel

Service Notes:

## 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!

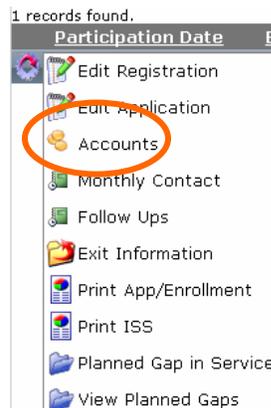
## Adding Accounts and Obligations

### Adding Accounts

In order to add an obligation to a client's file, you must first set up an 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

A screenshot of a web application window titled "Enrollment Accounts". It shows a table with the following columns: Source, Max. Amount, Begin Date, End Date, Acct Total, and Available. The first row is selected with a checkmark in the Source column. Below the table is a "Grand Total" row.

Source	Max. Amount	Begin Date	End Date	Acct Total	Available
<input checked="" type="checkbox"/> WIA-Adult ITA - PY06-07 - Region 4	\$3,000.00	07/01/2007	06/30/2008	\$3,000.00	
<input type="checkbox"/> WIA-Adult Support - PY06-07 - Region 4	\$500.00				
<input type="checkbox"/> WIA-Adult ITA - PY07-08 - Region 4	\$3,000.00				
<input type="checkbox"/> WIA-Adult Support - PY07-08 - Region 4	\$500.00				
<b>Grand Total:</b>				3000.00	

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

---

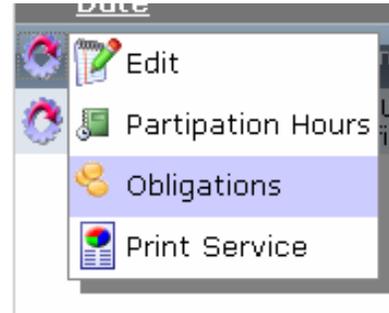
6. Repeat the process for all accounts you want to set up and click **Finish**.

**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.



anning > Indy WIA Obligations

select the client account that will be used to pay the vendor. Enter a 'Not to Exceed' Expense Category. Finally, enter the description of items/services to be purchased, as it

**Date:\***

**Account:\*** -- SELECT --

**Amount:\*** -- SELECT --

**Expense Type:** WIA-DislWrkr ITA - PY06-07 - Region 3 - 2...  
-- SELECT --

**Description:\***

**PO Number:**

Save Pause Cancel

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

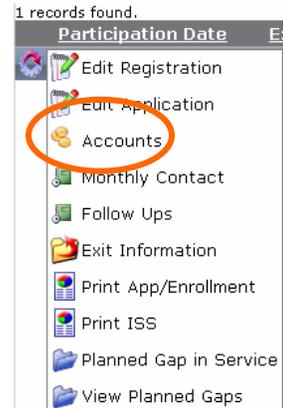
5. Click **Save**.

## 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.

Source	Max. Amount	Begin Date*	End Date*	Acct Total	Available	Obligations
<input checked="" type="checkbox"/> WIA-Adult ITA - PY06-07 - Region 5	\$3,500.00	04/20/2008	06/30/2008	\$2,500.00	\$1,175.00	<a href="#">Obligations</a>
<input type="checkbox"/> WIA-Adult Support - PY06-07 - Region 5	\$1,200.00					<a href="#">Obligations</a>
<input type="checkbox"/> WIA-Adult ITA - PY07-08 - Region 5	\$3,500.00					<a href="#">Obligations</a>
<input type="checkbox"/> WIA-Adult Support - PY07-08 - Region 5	\$1,200.00					<a href="#">Obligations</a>
<input type="checkbox"/> WIA-Adult Short Term Training - PY06-07 - Region 5	\$3,500.00					<a href="#">Obligations</a>
<input type="checkbox"/> WIA-Adult Short Term Training - PY07-08 - Region 5	\$3,500.00					<a href="#">Obligations</a>
<b>Grand Total:</b>				2500.00		

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

2/9/2008 test, tony - WIA-Adult ITA - PY06-07 - Region 5

**Obligations**

Displayed below are the obligations referencing the selected account.

Add New Cancel

4 records found.

Description	Obligation Amount	Amount Paid	Provider
Tuition	\$875.00	0.0000	Indiana WorkOne System
Gas Allowance	\$150.00	0.0000	Indiana WorkOne System
Gas Allowance	\$150.00	0.0000	Indiana WorkOne System
Gas Allowance	\$150.00	0.0000	Indiana WorkOne System

## 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.

The screenshot shows a web form titled "Credentials". It contains the following fields and values:

- Credential Type:** AA/AS Diploma/Degree (selected from a dropdown menu)
- Description of Credential:** AS - Computers
- Name of School/Training Institution:** Ivy Tech
- Planned Attain Date:** 01/01/2007
- Actual Attain Date:** 01/01/2007
- Comments:** (empty text area)
- Record Created By:** (empty text field)
- Organization:** (empty text field)

**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.

The screenshot shows a search form for credentials. It includes the following fields:

- Credential:** If a degree or other credential was attained during or after participation in the program, fill in the info below. You can use the pop-up search form to add a new Credential record and select it.
- Was a Degree Attained:** Yes (selected from a dropdown menu)
- Type of Credential:** (empty text field)
- Description:** (empty text field)
- Institution:** (empty text field)
- Date Attained:** (empty text field)



### 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.

The screenshot shows the 'Test Results' form in TrackOne. The left navigation pane has 'Test Results' selected, indicated by an orange arrow. The main content area is titled 'Indy WIA Test Results' and contains the following text:

Identify the test the client took along with the results of that test.

**WIA Youth Literacy and Numeracy Gains Measures:**  
Test names marked with (Y) can be used to assess literacy and numeracy skills for the WIA Youth performance measures. Test names marked with (Y-ESL) can be used to assess English literacy skills for English as a Second Language (ESL) youth for the WIA performance measures.

For the performance measures, youth must be given a pre-assessment within 60 days of enrolling in WIA, and a post-assessment within one year, and once a year thereafter while they are participating in WIA.

**IMPORTANT:** In order to be counted in performance measures, the *numeric* scale score must be entered in the Score field. (For example, a TABE score value might be something like 350, but NOT 8.5 or 21/25.)

The form fields are:

- Test Name\*: TABE - Math (Y)
- Test Type\*: Oral
- Date\*: [Empty]
- Score: [Empty]
- Grade Level: [Empty]
- Passing/Competent:
- Description/Comments: [Empty text area]

Buttons at the bottom right: Save (with a green checkmark), Pause (with a green vertical bar icon), and Cancel (with a red X icon).

### 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.

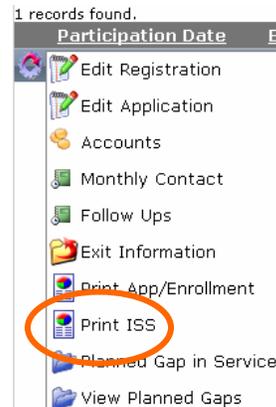
## ISS (Individual Service Strategy / Individual Employment Plan)

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

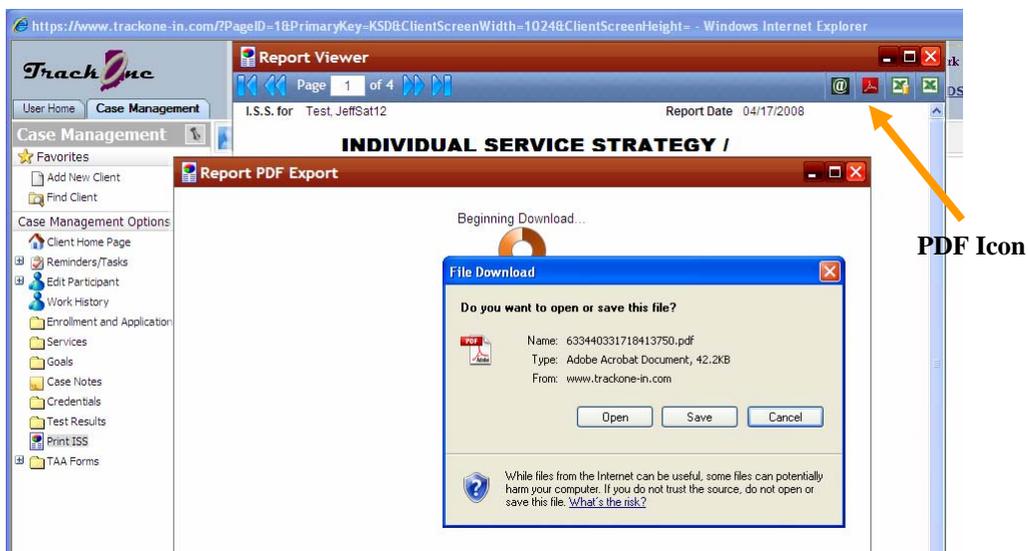
TrackOne simplifies this greatly by creating an Individual Service Strategy/Individual Employment Plan automatically. TrackOne “mines” data from all of the participant transaction records the case manager has created in the system. The system then populates the fields in the ISS/IEP form with the data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



## 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.

The screenshot displays the TrackOne software interface. On the left, a sidebar contains a 'Favorites' section with 'Add New Client' and 'Find Client', and a 'Case Management Options' section with various icons and folders. An orange arrow points to the 'Enrollment and Application' folder in the sidebar. The main window is titled 'Enrollment and Application' and contains a table with one record. A context menu is open over the record, with 'Exit Information' highlighted by an orange circle.

Participation Date	Exit Date	App. Date
		4/3/2008

## Exiting a Client – “Planned Exit” – TrackOne Navigational Training

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.

**Case Closure Information**

If all planned services for the participant have been completed, please complete the following information concerning the participant's status at the time of exit. The information recorded here is used for performance measures, so it is important to make sure it is accurate.

Participation Date: 4/3/2008  
Last Service Date: 4/4/2008  
Planned Exit Date:   
Date Completed All Goals:   
Exit Code: -- SELECT --  
Actual Exit Date:  
Reason:

**Educational Status at Exit**-Please complete the following information

School Status at Exit:

**Post Secondary Status**

Enrolled in Educ. Program

**Credential**-If a degree or other credential was attained during or after participation in the program, fill in the info below. You can use the pop-up search form to add a new Credential record and select it.

Was a Degree Attained: -- SELECT --  
Type of Credential:   
Description:  
Institution:  
Date Attained:

**Exit - Employment**-If the participant was employed at exit, please select the Employer at Exit from the participant's Work History by clicking on the search icon. You can also add a new Work History record from the pop-up search screen.

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

**Reviewer Information**-Please complete the following information to identify the Interviewer and reviewer

Interviewer:\* Ken Davidson  
Interview Date:\* 04/17/2008  
Reviewer:  
Date File was Archived:

Save  Pause  Cancel

### Procedure

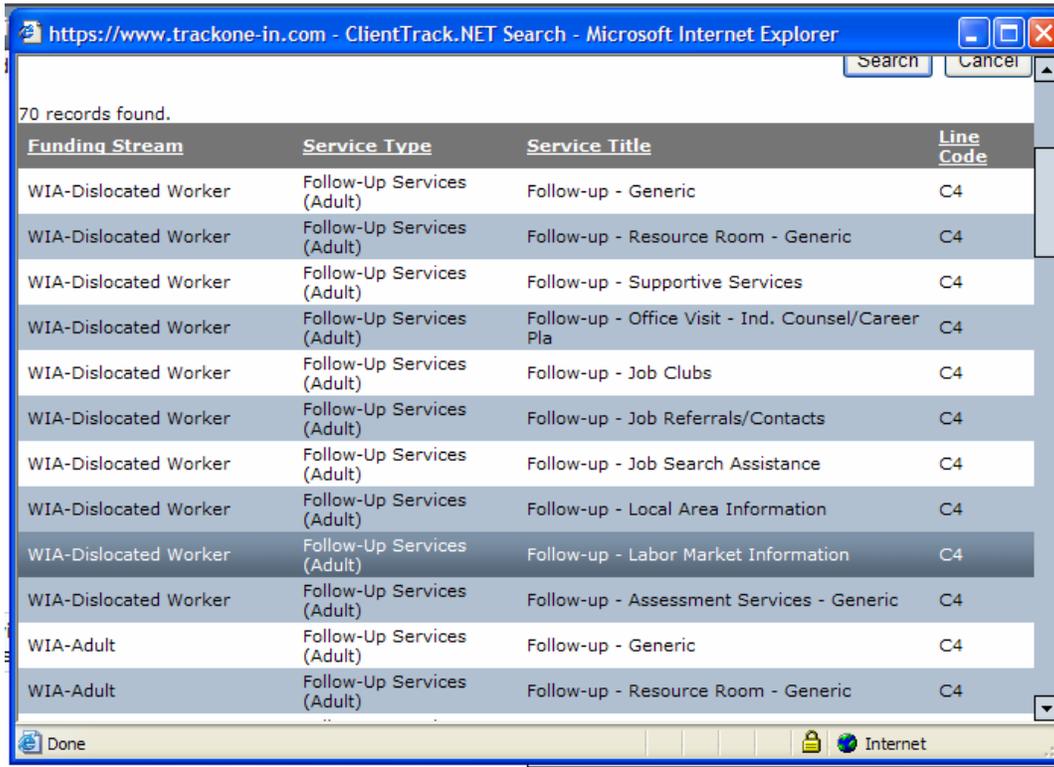
1. Click **Enrollment and Application** on the TrackOne Navigation Panel.
2. Click the  **Gear** icon left of the application and select Exit Information.
3. Complete the **Case Closure Information** screen with all applicable information.
4. Click the **Save** button.



**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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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.

The screenshot displays the 'Enrollment and Application' screen in the TrackOne software. On the left, the navigation panel shows 'Enrollment and Application' selected, with a sub-menu open. The 'Follow Ups' option is highlighted and circled in orange. The main content area shows a table with one record found, and a 'Follow Up Contact' form with the following fields:

Participation Date	Exit Date	App. Date	Inter
		4/3/2008	Jeff M

Below the table, the 'Follow Up Contact' form contains the following information:

- Name: Test, JeffSat12
- Home Phone: 599-9999
- Work Phone: 317-750-3382
- Follow Up Date: 04/17/2008
- Follow Up Type: 1st Quarter
- Contact Type: Meeting/Office Visit
- Result: Completed all questions
- Employment Status: Unemployed
- Type of Credential: (empty field)
- Description: (empty field)
- Institution: (empty field)
- Date Attained: (empty field)
- Type of Training: None

### 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.

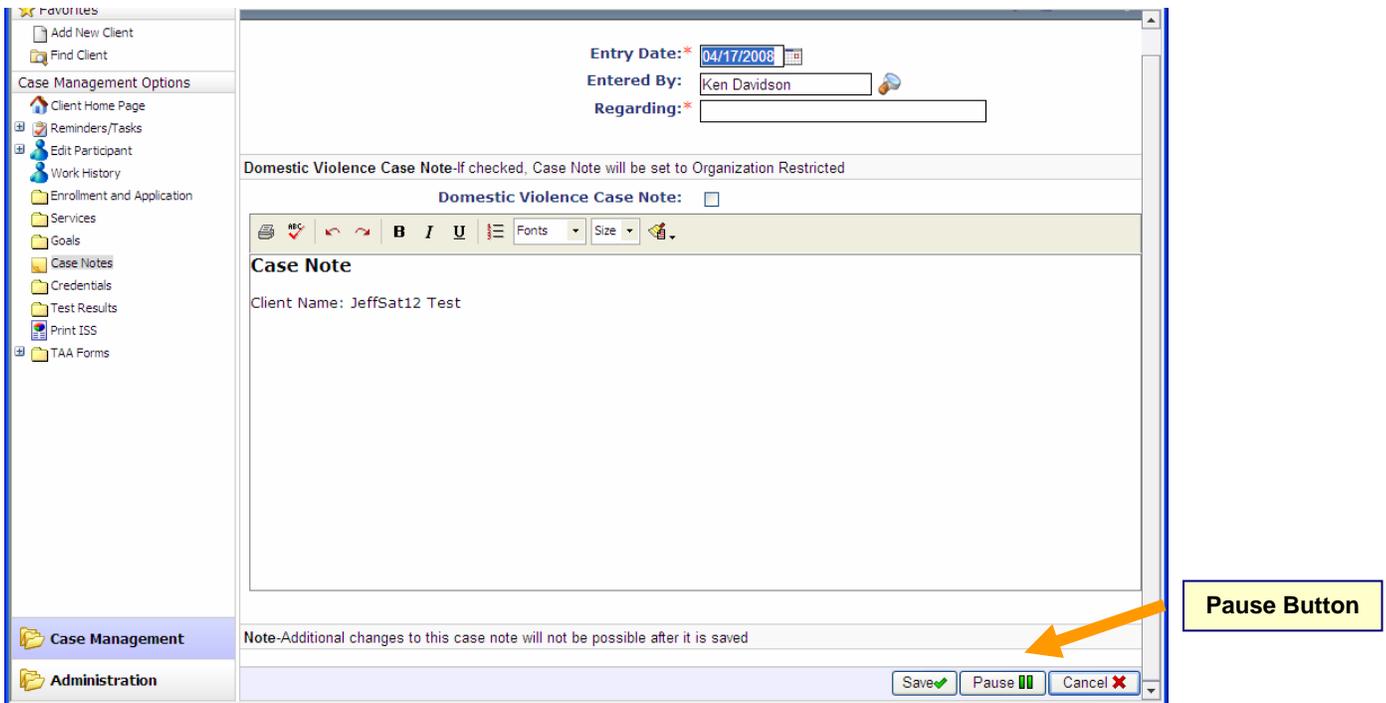
## Paused Operations

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:

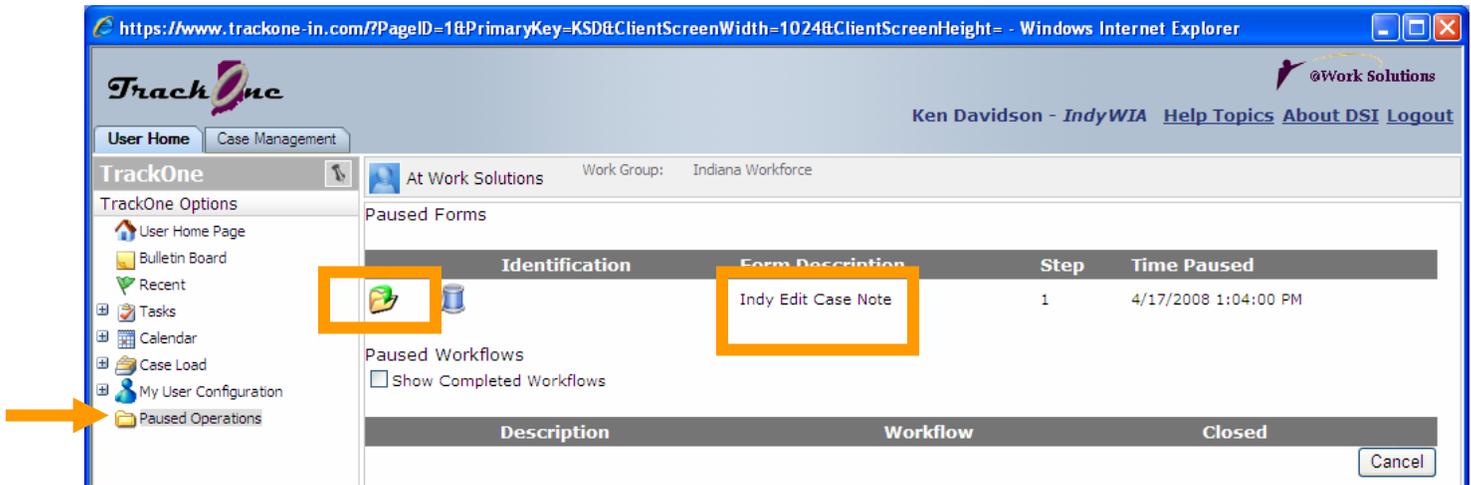
- A fire alarm goes off.
- Client shows up for an appointment, but forgot an important piece of documentation necessary for the eligibility determination process.
- Client leaves in the middle of an eligibility determination appointment to visit the restroom and doesn't return.

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**.