

**MARCH 2008**

# **TrackOne Upgrade: Version Comparison**

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## User Home Tab

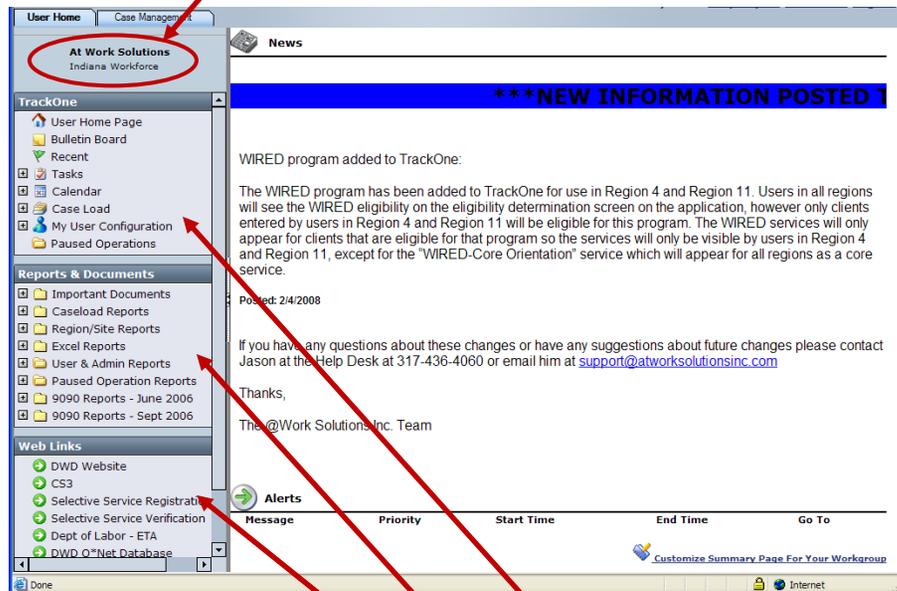
### User Home Page

When you first log into TrackOne, you will immediately see a difference with the look and feel of the system. The first thing that will appear upon logging in is the new “User Dashboard”. Changes have been made to make TrackOne easier for the user to navigate and remove some of the clutter.

### TrackOne Version 9.2.2

#### User Home Page

The user's organization and workgroup appears on the upper left hand corner of the navigation box

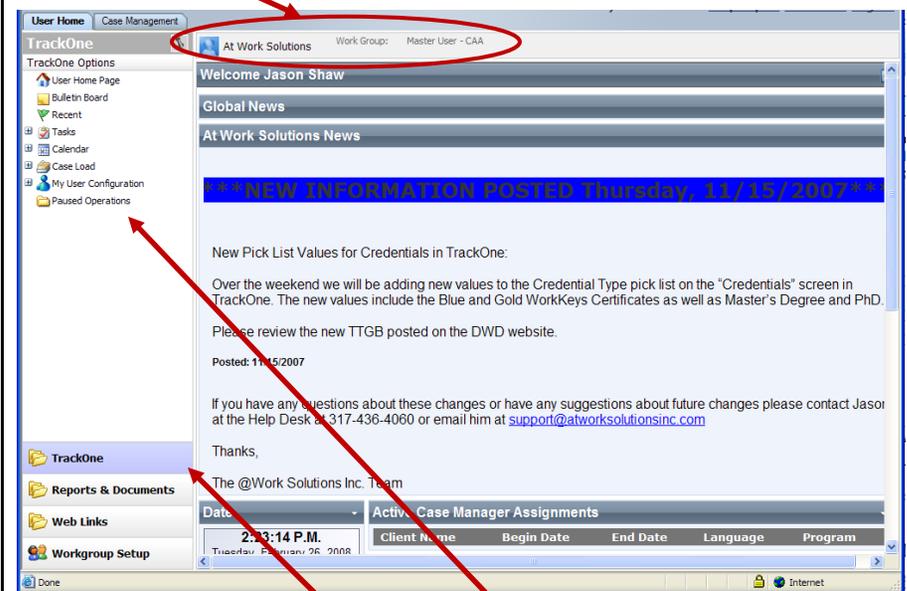


The tabs all appear, along with with all of their sub-menu items in the left hand navigation panel.

### TrackOne Version 2007

#### User Home Page

The user's organization and workgroup now appear on the top of the production box.



The tabs now appear as folders at the bottom of the navigation panel, and the sub-menu items will appear at the top of the panel when the folder is selected.

## User Dashboard

The new version of TrackOne now has a customizable “User Dashboard” that will help the user manage their caseload and keep updated on new features of TrackOne

### New Features in the User Dashboard

Active Case Manager Assignments:

Date and Time:

TrackOne Options

- User Home Page
- Bulletin Board
- Recent
- Tasks
- Calendar
- Case Load
- My User Configuration
- Paused Operations

TrackOne

Reports & Documents

DWD Monitoring Reports

Reports-Testing

Web Links

Administration

Workgroup Setup

\*\*\*NEW INFORMATION POSTED Thursday, 11/15/2007\*\*\*

New Pick List Values for Credentials in TrackOne:

Over the weekend we will be adding new values to the Credential Type pick list on the “Credentials” screen in TrackOne. The new values include the Blue and Gold WorkKeys Certificates as well as Master’s Degree and PhD.

Please review the new TTGB posted on the DWD website.

Posted: 11/15/2007

If you have any questions about these changes or have any suggestions about future changes please contact Jason at the Help Desk at 317-436-4060 or email him at [support@atworksolutionsinc.com](mailto:support@atworksolutionsinc.com)

Thanks,  
The @Work Solutions Inc. Team

Alerts

Priority	Status	Type	Begin Date	Description
Date		Active Case Manager Assignments		
10:36:05 A.M. Thursday, March 6, 2008				
Client Name	Begin Date	End Date	Language	Program
Test2, Jeff2Test	3/6/2008		English	
TEST, TEST	3/6/2008		English	
Demo, Jason	2/29/2008		English	

Note: Client alerts for a user’s case load will still appear on the User Home screen directly below the news bulletin

## Reports and Documents

Accessing and generating reports is the same in the new release of TrackOne as it was in the old release. The main difference is seen after the report is generated. The reports no longer generate in a new window, instead they appear inside the open TrackOne window, and can be minimized or closed within the window. The screenshots below show some differences in the look of the reports and how they are converted to .pdf or excel files. **IMPORTANT: Be sure that the TrackOne URL ([www.trackone-in.com](http://www.trackone-in.com)) is listed in your trusted sites or else there might be some issues converting the file to a .pdf**

### TrackOne Version 9.2.2

#### Converting the Report to a .pdf or excel file

The Adobe and Excel icons used to convert the report are located in the middle of the menu bar at the top of the screen.

Counter	Organization	Name	SocSecNo	AdDs/Yo/N	TAR	Enrl / First Service	Last Service	Official Exit Date	Official Exit Reason	Case Managers
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### TrackOne Version 2007

#### Converting the Report to a .pdf or excel file

The Adobe and Excel icons used to convert the report are located on the top right corner of the report screen.

Counter	Organization	Name	SocSecNo	AdDs/Yo/N	TAR	Enrl / First Service	Last Service	Official Exit Date	Official Exit Reason	Case Managers
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## Case Management Tab

Just like with the User Home section of TrackOne, the Case Management section of the new release of TrackOne has all of the same functionality with a few modifications. All of the menu options in the Navigation Panel are the same in the new release.

**The new Client Dashboard works as a summary screen for the client's activity. Users can see a client's:**

**Basic Demographic Information**

**The Client's last five Periods of Participation**

**The Client's last five Services**

<b>Name :</b> Demo, Jason	<b>SSN :</b> 000-11-0012	<b>DOB :</b> 1/1/1980
<b>Employment Status :</b> Not employed	<b>Highest Degree Attained :</b> GED	<b>Military Service :</b> 1
<b>Home Phone :</b> 317-311-1111	<b>Address :</b> 111 Prim Rd	<b>City :</b> Indianapolis

Participation Date	First Intensive Service	First Training Service	Last Service Date	Exit Date	Organization	Region
2/13/2008	2/15/2008	3/1/2008	9/1/2008		At Work Solutions	

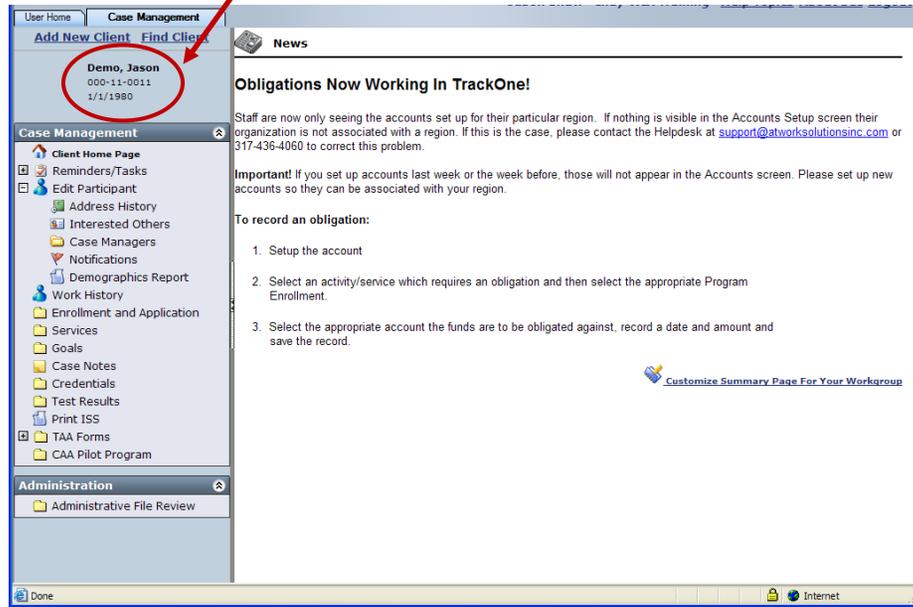
Begin Date	Title	Funding Stream	Planned End	Actual End	Provided By	Service Prevents Exit
3/1/2008	Occupational Skills Training - Generic	WIA-Adult	9/1/2008		KVWorks - Valpo	True
2/25/2008	Supportive Service - Generic Item/Vendor	WIA-Adult	2/25/2008	2/25/2008	KVWorks - Valpo	True
2/15/2008	1-on-1 Counseling - Customer Crisis/Issue	WIA-Adult	2/15/2008	2/15/2008	KVWorks - Valpo	True
2/13/2008	Self-help - Job Search - Generic	Core Services	2/13/2008	2/13/2008	Vincennes - Orange	True

## Client Home Page

### TrackOne Version 9.2.2

#### Client Home Page

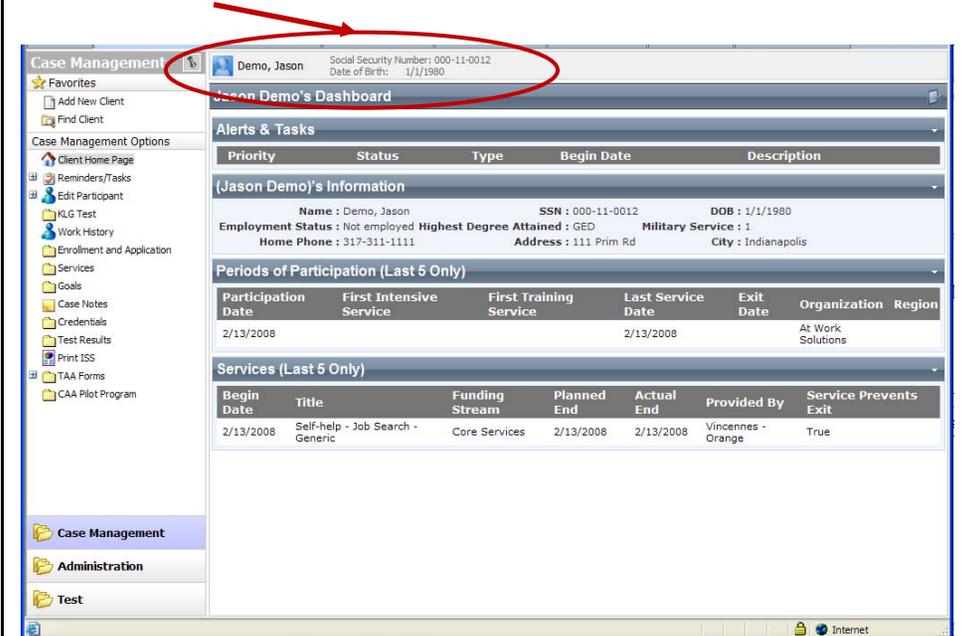
The client home page is a news bulletin posted regarding changes in TrackOne. The client's name, Social Security Number, and Date of Birth appear on the upper left corner of TrackOne, at the top of the Navigation Panel.



### TrackOne Version 2007

#### Client Home Page

The new release contains a dashboard for each client, similar to the user home dashboard. The client dashboard contains basic client information, as well as a snapshot of the recent services given to a client. The client's name, Social Security Number, and Date of Birth appear on the top of the Production Panel.



## Application

The information collected and the flow of the application remains the same in the new release, however some features have been added to help streamline data entry along with some extra text instructions regarding fields on the application.

## Employment Information

**Instructional Text boxes have been added to help users understand the fields on the application and how they affect a client's eligibility.**

**Case Management**

★ Favorites

- Add New Client
- Find Client

Case Management Options

- Client Home Page
- Reminders/Tasks
- Edit Participant
- KLG Test
- Work History
- Enrollment and Application
- Services
- Goals
- Case Notes
- Credentials
- Test Results
- Print ISS
- TAA Forms
- CAA Pilot Program

Case Management

Administration

Test

loaded

Internet

Demo, Jason Social Security Number: 000-11-0012 Date of Birth: 1/1/1980

### Application - Employment Information

**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

**Unemployment Insurance:**\* No

**Weeks Unemployed:**\* 26

**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:** [Search Icon]

**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.  
(NOTE: 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

Save ✓ Cancel ✗

Application

**TrackOne Version 9.2.2**

**Application: Most Recent Job History**

The “Most Recent Job History” field on the application draws from the information entered in the Work History section of TrackOne. If no work history is present when the application is being entered, the case manager must exit the application and enter the work history before continuing.

Application - Employment Information

Employment/Dislocation Information-Click on the Most Recent Job History search icon to select the current or most recent job held (and make sure the client's Work History is up to date). If applying for Dislocated Worker status, select the qualifying category from the Dislocated Worker drop-down list.

**Most Recent Job History:** Greenleaf Living Center - Cook

**Current Employment Status:** Employed

**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

**Laid off from TAA Certified Employer:** [ ]

**Employer Location:** [ ]

**TAA Petition Number:** [ ]

**Unemployment Insurance:\*** No

Application - Other Client Information

**Family Status:** Parent in one-parent family

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

**Number In Family:** 3

**Family Income for previous 6 Months:** 10200.00

**Homeless:**

**Foster Child:**

**Food Stamps:** Pending

**TrackOne Version 2007**

**Application: Employer at Dislocation**

The “Most Recent Job History” field has been renamed to “Employer at Dislocation”. This information still pulls from what is entered in the “Work History” section of TrackOne, but if there is no work history present when the application is being entered, the case manager can enter the work history directly from the application instead of having to leave the application screen.

Case Management Demo, Jason Social Security Number: 000-11-0012 Date of Birth: 1/1/1980

Application - Employment Information

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

**Unemployment Insurance:\*** No

**Weeks Unemployed:\*** 26

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.  
(NOTE: 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

Save Cancel

**Note: This Employer Look-Up function is also available on the Exit and Follow-Up screens**

## Application

### TrackOne Version 9.2.2

#### Application: Barriers

The barriers are listed on the application and can be selected when appropriate for each client. There is no description of the barrier or how it affect's the client's eligibility.

Application - Barriers

Disabled:\* No

Limited English:

Substance Abuse:

Poor Work History:

TANF Exhaustee:

Basic Skill Deficient: False

Offender:

Pregnant/Parent Youth:

Youth-Needs Assistance:

Runaway:

High School Dropout:

Locally Defined Barrier:

Application - Eligibility

### TrackOne Version 2007

#### Application: Barriers

Instructional text boxes have been added to the barriers section of TrackOne to help users identify how the barriers affect the client's eligibility in TrackOne.

Demetrius, Jason    Social Security Number: 000-11-0012  
Date of Birth: 1/1/1980    Date Service Began: [ ]

Application - Barriers

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-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: False

Limited English:

Substance Abuse:

Offender:

Pregnant/Parent Youth:

Youth-Needs Assistance:

Runaway:

High School Dropout:

Application - Eligibility

Exit Information Screen

**TrackOne Version 9.2.2**

**Exit Information: Credential Attained**

On the Exit Information screen, the Credential Attained field is a picklist of possible credentials. This picklist is not editable and the user must select one of the options in order to continue.

Employment Status:\* -- SELECT --  
 Add Job Record  
 Employer (from Work History):  
 Job Title:  
 Start Date:  
 End Date:  
 Wage:  
 Credential Attained:\*  
 None  
 -- SELECT --  
 None  
 High School Diploma  
 GED  
 HS Equivalency (Disability)  
 AA/AS Diploma/Degree  
 BA/BS Diploma/Degree  
 Masters Degree  
 PhD  
 Occupational Skills License  
 Occupational Skills Certificate/Credential  
 Journeyman Status  
 Certificate of Technical Achievement  
 WorkKeys Certificate - Silver (Blue)  
 WorkKeys Certificate - Gold  
 Other

**TrackOne Version 2007**

**Exit Information: Credential Attained**

Users can now search for the credentials that have been entered in the "Credentials" section of TrackOne. If no credentials are available, than the user can add a credential straight from the Exit Information Screen. This is similar to the Work History.

Employment Status:\* -- SELECT --  
 Credential-If a new degree or credential was attained, use the search icon to create a Credential record and link it to the follow-up.  
 Type of Credential Attained:  
 Description:  
 Institution:  
 Date Attained:  
 Credential-If a new degree or credential was attained, use the search icon to create a Credential record and link it to the follow-up.  
 Type of Credential Attained:  
 Credentials Summary  
 Diplomas, degrees and other credentials attained by this client are listed below. Click on a record to select it.  
 Click Add New to record a new credential.  
 Add New Cancel  
 1 records found.  

Credential Type	Description	Institution	Planned Attainment Date	Attained	Date Attained
High School Diploma	High School Diploma	Ridgemont High School	4/12/2007	False	

**Note: This Credential Look-Up function is also available on the Follow-Up screens**