Deloitte.

SNAP Works Provider User Guide

SNAP Works

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0.1	11/28/2018	Initial Submission	Deloitte Consulting
0.2	12/19/2018	New page – View Tasks	Deloitte Consulting
0.3	08/07/2019	Phase 2 Changes	Deloitte Consulting

Contents

1. Introduction

1.1 Overview

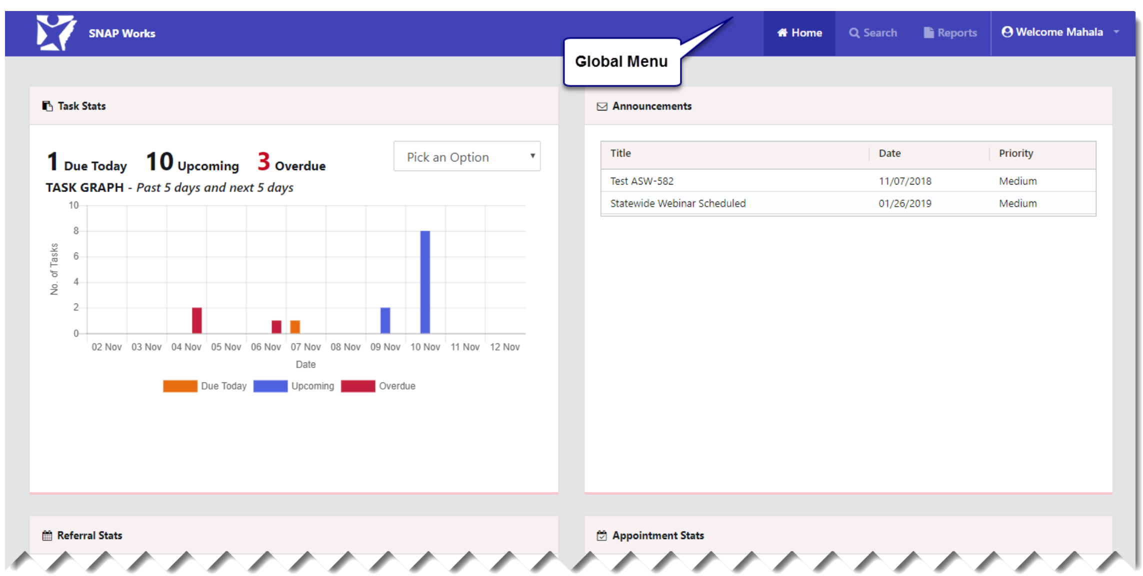
The ***SNAP Works*** application facilitates the successful participation and completion of the SNAP Employment and Training program for SNAP recipients. The application has three portals, provider, state worker, and citizen portals, to guide SNAP recipients through the Employment and Training program with the ultimate goal of helping SNAP recipients gain regular employment for economic self-sufficiency.

1.2 Global Features

The ***SNAP Works*** application has many global features that give the user a seamless, intuitive experience. These features include the global menu, left navigation, tabs, grid pages, Chatbot, and validation messages and notifications. These are detailed in the subsequent sections below.

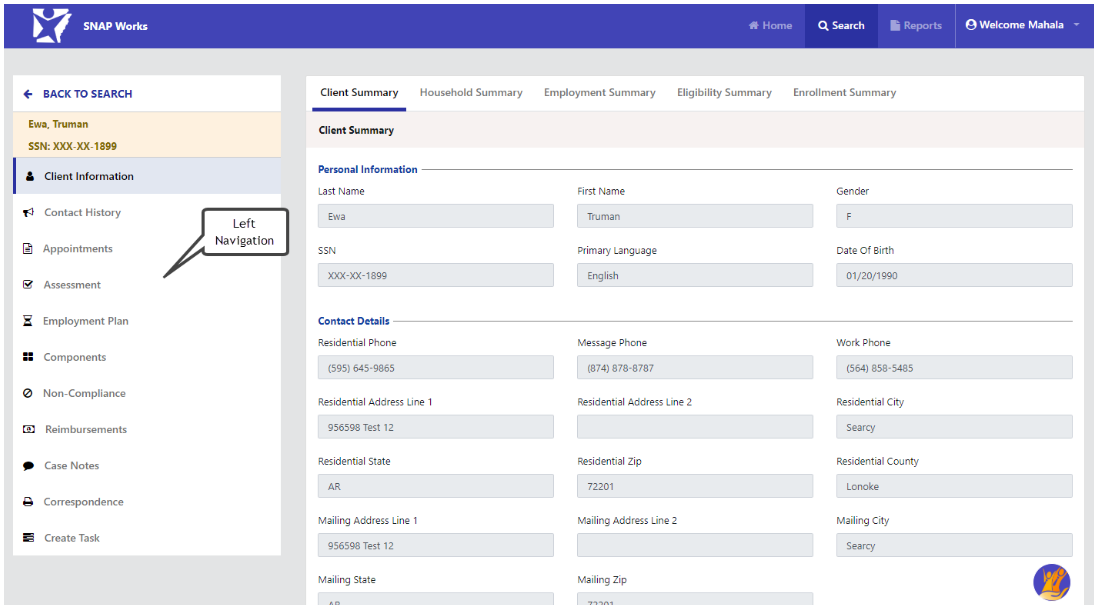
1.2.1. Global Menu

The Global Menu is on the top right of the ***SNAP Works*** application within the top banner. This allows the user to navigate to Home, Search, Reports, or log out from anywhere within the application. Below is a screenshot of the Global Menu.



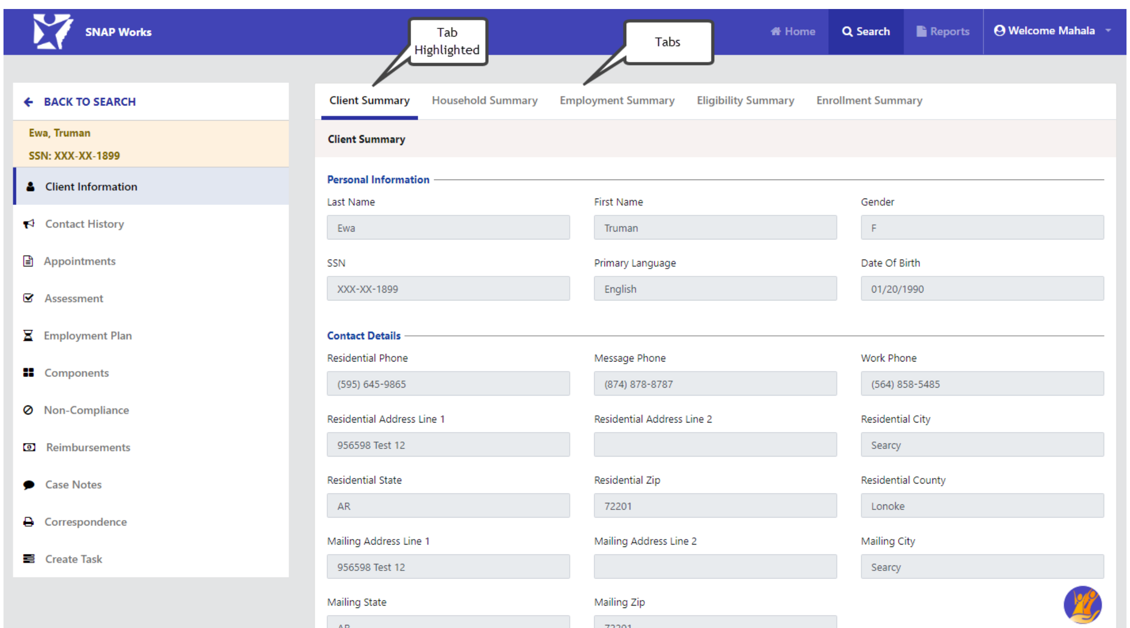
1.2.2. Left Navigation

The Left Navigation is shown on the left side of the client pages, reverse referral pages, and reports. Within each of these sections, the user can navigate to subsections by clicking the desired hyperlink. Below is a screenshot of the Left Navigation.



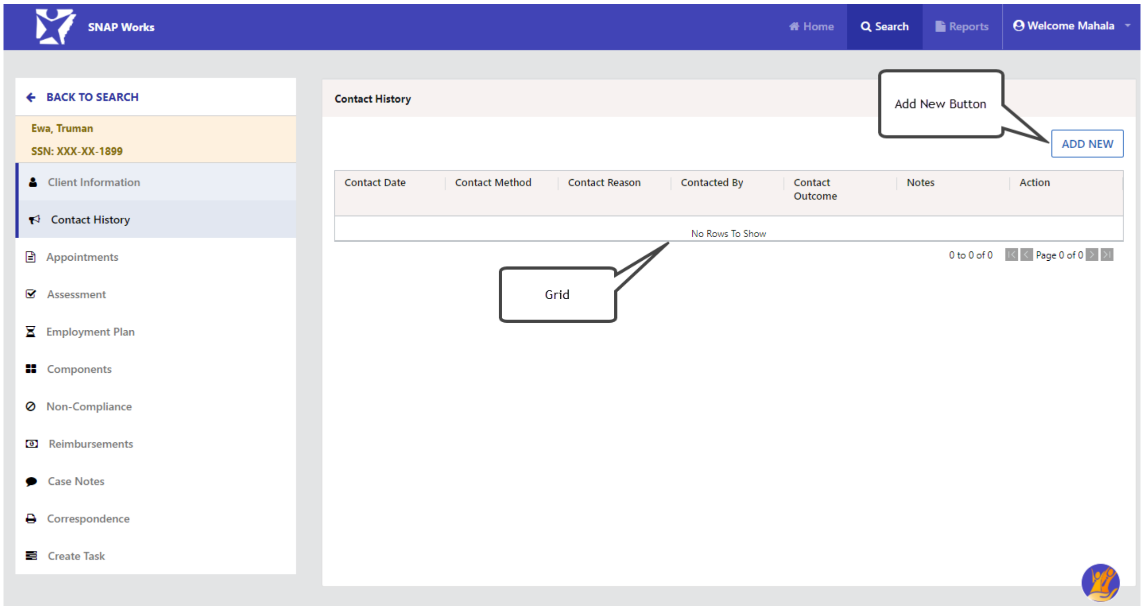
1.2.3. Tabs

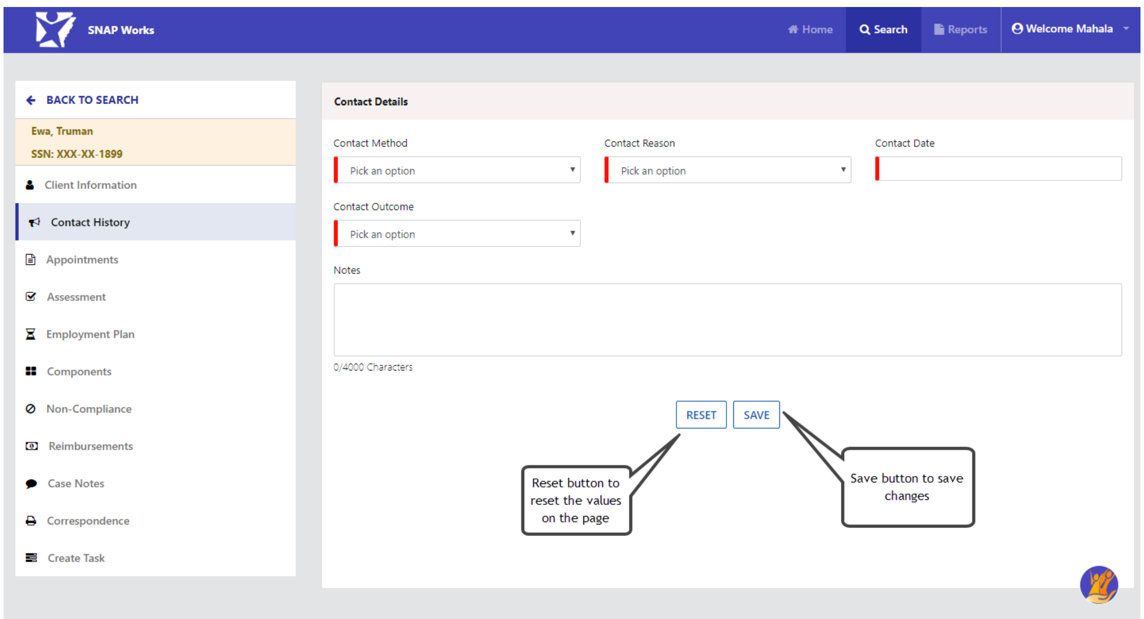
Tabs across the top of a subsection allow the user to easily navigate through the subsection. When the user is on a specific tab, that tab will be highlighted. Below is a screenshot of the Tabs and Tab Highlighted.



1.2.4. Grid Pages

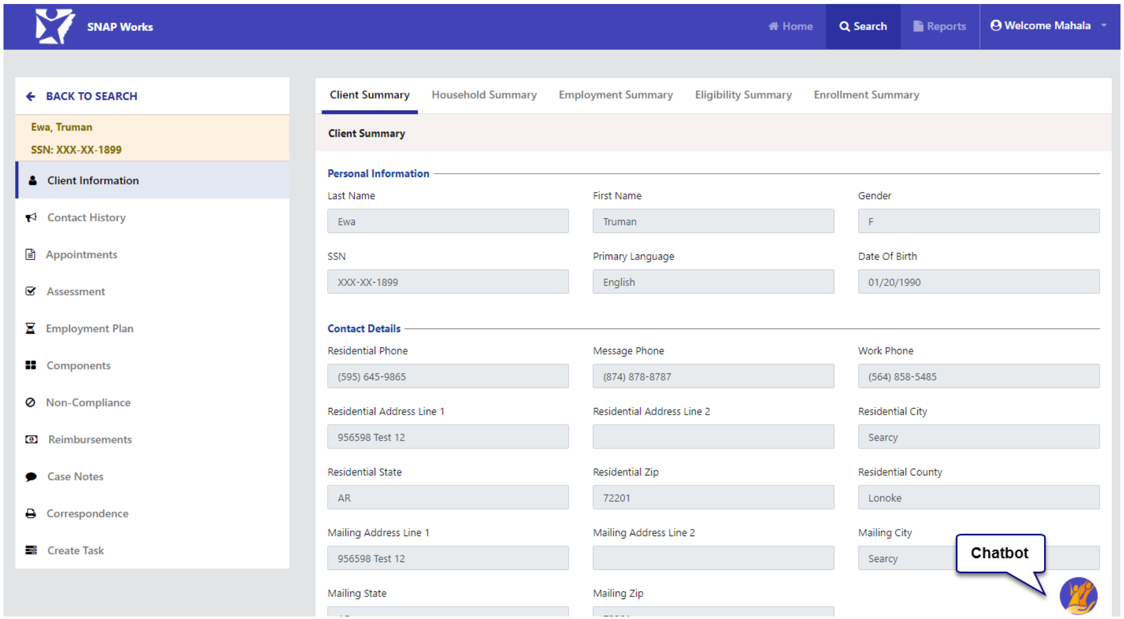
Grid Pages contain tables of search results or data entry records. On the top right of most Grid Pages is an **Add New** button. Upon clicking the **Add New** button, a data entry page will display. At the bottom of each data entry page is a **Save** and **Reset** button. Upon clicking the Save button, the information will be saved to the Grid Page. The user can also select the **Reset** button on the page to clear any data entry information. Below are screenshots of the Grid Page and Data Entry Page.





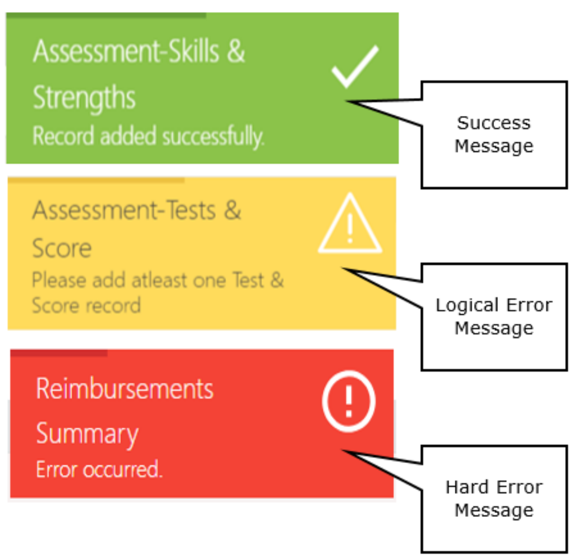
1.2.5. Chatbot

The Chatbot displays on the bottom right corner throughout the ***SNAP Works*** application and can be moved by simply dragging the Chatbot icon. The Chatbot is a computer program that simulates interactive human conversation when the user types in a question or topic relevant to the ***SNAP Works*** application. Below is a screenshot of the Chatbot. For more information related to the Chatbot, refer to section 42 Chatbot for details.



1.2.6. Validation Messages and Notifications

Validation Messages and Notifications are shown throughout the ***SNAP Works*** application when appropriate. Validation Notifications appear on the top right of the page when information is successfully saved, or information is not saved due to missing data, or when a system error occurs. Below are examples of the Validation Messages and Notifications.



1.2.7. Accessibility

The ***SNAP Works*** application shall ensure quality services and comply with the Americans with Disabilities Act of 1990.

1.2.8. Social Security Numbers

For security purposes, all data stored within our databases, including Social Security Numbers, Individual Taxpayer Identification Numbers and Dates of Birth are encrypted with 128-bit encryption to ensure that in the event a data breach is attempted, the data will be protected.

To further protect the data of the SNAP participant, all Social Security Numbers displaying within the ***SNAP Works*** application are masked. Social Security Numbers will display as XXX-XX-####, displaying only the last 4 digits of the participant's Social Security Number.

2 About This Guide

2.1 Who Should Use This Document

This guide is intended for the following groups:

- Providers

2.2 Prerequisite Knowledge

Using the ***SNAP Works*** application and guide assumes that the user has the following prerequisite knowledge:

- Using a Tablet PC, Laptop, or standard desktop computer
- Internet connectivity with one of the following browsers:
    - Google Chrome
    - Edge
    - Internet Explorer 11 or higher
    - Safari
    - Mozilla Firefox
- ***Employment and Training (E&T)*** process, including rules, regulations and related forms as they apply to the user's role

2.3 Conventions

This document uses the following conventions:

- ***Italics*** – The status and procedure titles are shown italicized (for example, the status changes to ***Open***)
- **Bold** – Keyboard keys, buttons, menu options, and list items are shown in bold (for example, click **Save**)
- Click and double-click – When these terms are used, tap and double-tap can be substituted for Tablet PC Users
- Select – The act of picking an item from a list or choice of options (for example, select Bachelor's Degree from the dropdown list)
- Tips – Important information to help the user to perform a task or better understand the task. Notes will be displayed in the following format:

> ***Tip:*** *Pertinent information will be addressed here to capture the user's attention to provide additional information on the subject.*

- New Features – Features new to the SNAP Works system resulting from SNAP Works Phase 2. New features will be display in the following format:

> ***New Feature:*** New features and functionality will be addressed here to capture the user's attention.

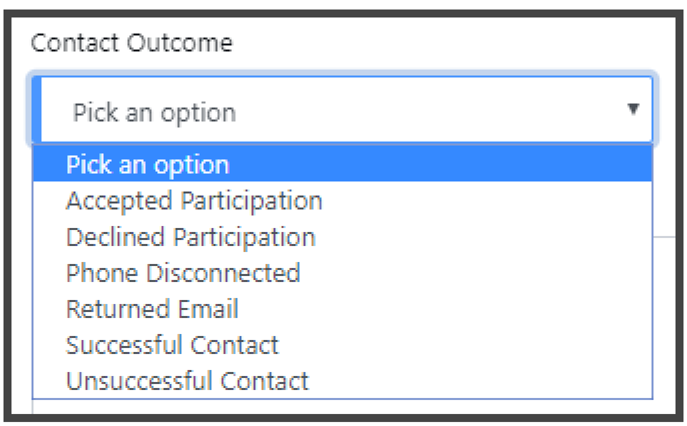
2.4 Common User Interface Elements

Checkboxes

A checkbox allows the user to make one or multiple selections from a predetermined list of choices. To select an item, move the mouse pointer to the appropriate box next to the record and click it. A check mark displays within the checkbox next to the selection.

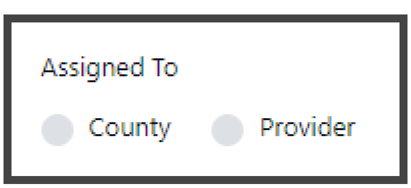
Dropdown Lists

A dropdown list allows the user to choose information from a predetermined list that "drops down" when activated. To select an item, move the mouse pointer to the appropriate item in the list and click it.



Radio Buttons

A radio button allows the user to choose one item from a small set of predefined values. To make a selection, click the radio button to the left of the appropriate value.

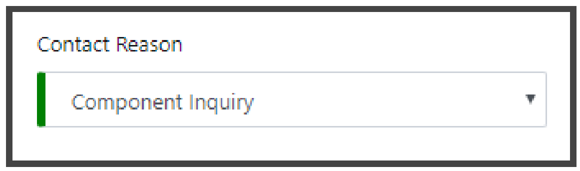


Text Boxes

Text boxes are used to record variable information, and may be either numeric or alpha-numeric depending on the information being requested. To enter information, tab to or click into the text box and type in the data. Text boxes that are shaded are read-only text boxes which provide data that cannot be changed.

About Required Fields

Many of the forms the user may use will require a minimum amount of information to save the record. As shown in the examples below, required information will be identified by a red bar on the left side of the text box. As data is entered in these required fields, the bar will change from red to green.



Glyph Icons

Glyph Icons are graphic symbols that are used throughout the application to communicate information visually, with minimal possibility of misrepresenting their meaning. In ***SNAP Works*** the following icons are used to represent the following buttons:

Edit

Audit

Delete

Read Only

Upload

Download

Print

2.5 Permissions

The table below describes the various levels of access and what type of activity can be performed. Based on the user's role (e.g., user type) in the ***SNAP Works*** application, the user may be granted permission to perform one or more of these activity types.

Permission	What the user can do
Create	Permission to create new records
Edit	Permission to edit/change current existing records

View	Read only permission on existing records
Assign	Assign tasks

The user may not be able to see certain text boxes, dropdown lists, and control buttons, based on their role.

3 Login Page

3.1 Overview

The Login Page is the landing page when the ***SNAP Works*** application is accessed. This page can be reached by anyone who has the URL of the ***SNAP Works*** application, and provides access into the ***SNAP Works*** application when valid login credentials are used.

3.2 Screenshot

Below is a screenshot of the Login Page.

3.3 Controls

The following table details the controls that are present on the Login Page. Each control includes a description and control type.

Controls	Description	Control Type
Username	User enters their username into this text box	Mandatory
Password	User enters their password into this text box	Mandatory
Login	Button that redirects the user to the Caseworker Dashboard Page	N/A
Forgot Password?	Text hyperlink that redirects the user to the Password Reset Page	Always enabled

Remember Me	Clicking this check box saves the Username	Optional
What I can do?	Static, informational text field	Display only
Security Usage Disclaimer	Static, informational text field	Display only
Accessibility	Text hyperlink that redirects the user to the Arkansas.gov Accessibility policy	Always enabled
Privacy	Text hyperlink that redirects the user to the Arkansas.gov Privacy policy	Always enabled
Security	Text hyperlink that redirects the user to the Arkansas.gov Security policy	Always enabled
Acceptable Use	Text hyperlink that redirects the user to the Arkansas.gov Acceptable Use policy	Always enabled

3.4 User Actions

The following table details the actions that the user can take on the Login Page. Each action includes a description.

User Action	Description
Login	The user can log in by entering their username and password into the **Username** and **Password** text boxes and then clicking the **Log In** button. The user has the option of saving their username on their computer by clicking the **Remember Me** check box before clicking the **Log In** button.
Reset Password	If the user forgets their password, the user can click the **Forgot Password** hyperlink, which will navigate them to the Reset Password page described in section **41 – Reset Password**.
Navigating to Other Websites	The user can read more about Work Programs Toolkit, Accessibility, Privacy, Security, and Acceptable Use by clicking hyperlinked text on the page as described below. • If the user clicks the **Accessibility** text in the footer, the user will be redirected to https://portal.arkansas.gov/pages/acceptable-use/#accessibility • If the user clicks the **Privacy** text in the footer, the user will be redirected to https://portal.arkansas.gov/pages/acceptable-use/#privacy • If the user clicks the **Security** text in the footer, the user will be redirected to https://portal.arkansas.gov/pages/acceptable-use/#security • If the user clicks the **Acceptable Use text** in the footer, the user will be redirected to https://portal.arkansas.gov/pages/acceptable-use/#acceptable

4 DHS Dashboard Page

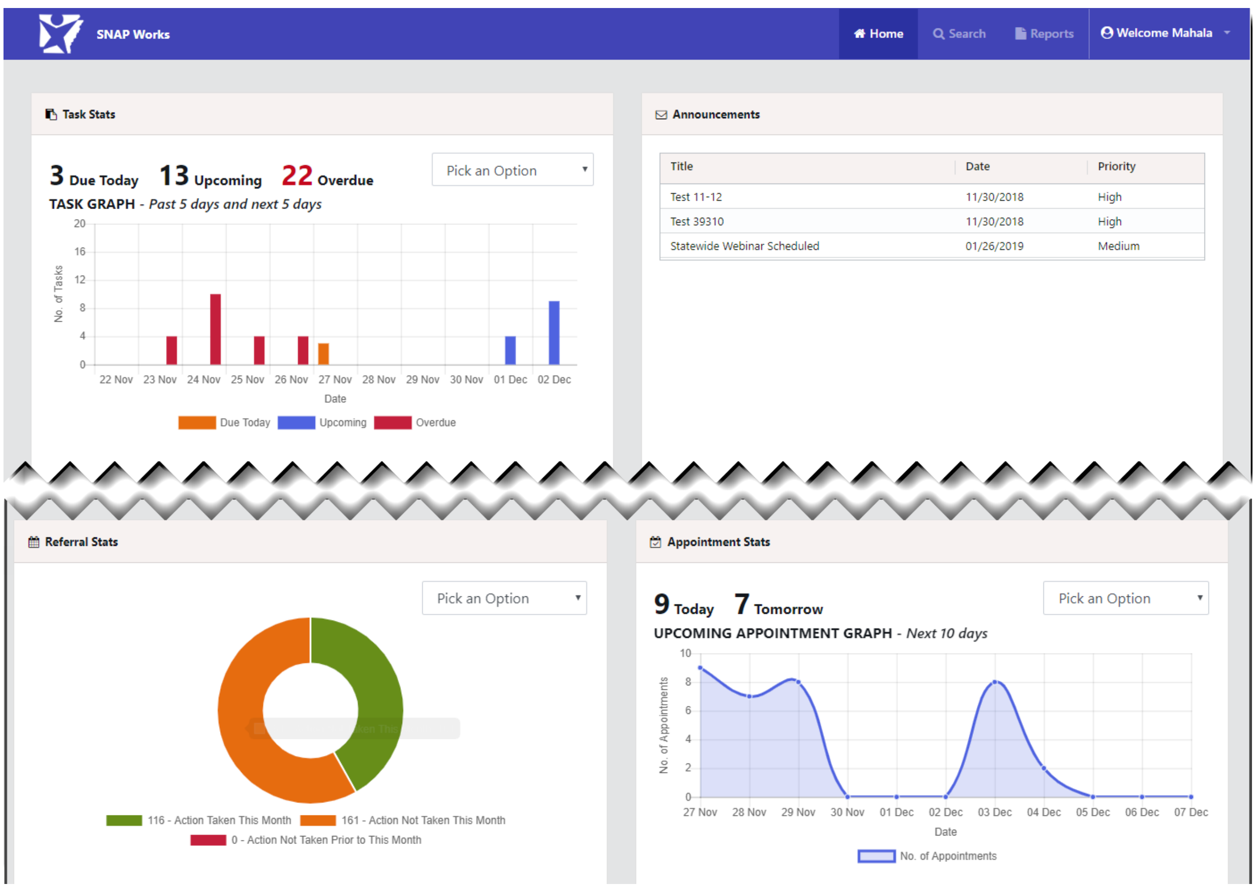
4.1 Overview

The Provider Dashboard Page is the “home” page when the user successfully logs into the ***SNAP Works*** application.

The Provider Dashboard consists of four sections (also referred to as Tiles) – Task Stats, Announcements, Referral Stats, and Appointment Stats.

4.2 Screenshot

Below are screenshots of the Provider Dashboard page.



4.3 Controls

The following table details the controls that are present on the Provider Dashboard Page. Each control includes a description and control type.

Controls	Description	Control Type
Task Stats	Text hyperlink that redirects the user to the Search Tasks Page upon clicking.	Always enabled

Due Today	Text hyperlink that redirects the user to the Search Tasks Page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
Upcoming	Text hyperlink that redirects the user to the Search Tasks Page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
Overdue	Text hyperlink that redirects the user to the Search Tasks Page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
County	Dropdown List that filters the Task Stats Tile	Always enabled
Task Graph	Dynamic graphical report	Always enabled
Announcements	Text hyperlink that redirects the user to the Announcement Summary Page upon clicking	Always enabled
Announcements Grid	Data grid containing static, informational text	Display only
Referral Stats	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
Referral Chart	Dynamic graphical report	Always enabled
New Appointments	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
No Appointment Scheduled in Last 7 Days	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
No Appointment Scheduled in Last 30 Days	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
County	Dropdown list that filters the Referral Stats Tile	Always enabled
Appointment Stats	Text hyperlink that redirects the user to the Search Tasks page upon clicking.	Always enabled
Today	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
Tomorrow	Text hyperlink that redirects the user to the Search Tasks page upon clicking. Page will be filtered to display only tasks related to this subject	Always enabled
County	Dropdown list that filters the Appointment Stats Tile	Always enabled
Appointment Graph	Dynamic graphical report	Always enabled

4.4 User Actions

The following table details the actions that the user can take on the Provider Dashboard Page. Each action includes a description.

User Action	Description
Task Stats	Clicking on the **Task Stats** hyperlink will send the user to the Search Tasks page. When the page loads, all Tasks associated to the user's Counties will display.
Due Today	Clicking on the **Due Today** hyperlink will send the user to the Search Tasks page. When the page loads, all Tasks (in Open and Pending Status) with today's Due Date will display.
Upcoming	Clicking on the **Upcoming** hyperlink will send the user to the Search Tasks page. When the page loads, all Tasks (in Open and Pending Status) with a due date that is within the next five (5) days will display.
Overdue	Clicking on the **Overdue** hyperlink will send the user to the Search Tasks page. When the page loads, all Tasks (in Open and Pending Status) with a due date that is prior to today will display.
Task Stats County Dropdown list	Clicking a **County** in the dropdown list will filter data in the Task Status tile for the selected County. The user will only see Counties that the user has been approved to see.
Task Graph	The user will be able to use their mouse to hover over the data in the graph to see the total number of tasks based on the selected location
Announcements	Clicking on the **Announcements** hyperlink will send the user to the Announcement Summary that displays a list of all active announcements the user has been sent.
Referral Stats	Clicking on the **Referral Stats** hyperlink will send the user to the Search Tasks page. When the page loads, all Referral Tasks associated to the user's counties will display.
Referral Chart	The user will be able to use their mouse to hover over the data in the graph to see the referral statistics based on the selected location.
New Appointments	Clicking on the **New Appointments** hyperlink will send the user to the Search Tasks page. When the page loads, all *Open* Referrals that have been received within the last seven (7) days will display.
No Appointment Scheduled in Last 7 Days	Clicking on the **No Appointment Scheduled in Last 7 Days** hyperlink will send the user to the Search Tasks page. When the page loads, all Referrals received more than (7) days but less than 30 days ago, that do not have an Appointment created will display.
No Appointment Scheduled in Last 30 Days	Clicking on the **No Appointment Scheduled in Last 30 Days** hyperlink will send the user to the Search Tasks page. When the page loads, all Referrals received 30+ days ago that do not have an Appointment created will display.
Referral Stats County Dropdown list	Clicking a **County** in the dropdown list will filter data in the Referral Stats tile for the selected County. The user will only see Counties that the user has been approved to see.
Appointment Stats	Clicking on the **Appointment Stats** hyperlink will send the user to the Search Tasks page. When the page loads, all Appointment Tasks associated to the user's counties will display.
Today	Clicking on the **Today** hyperlink will send the user to the Search Tasks page. When the page loads, all Appointments with a due date of today will display.

Tomorrow	Clicking on the **Tomorrow** hyperlink will send the user to the Search Tasks page. When the page loads, all Appointments with a due date of tomorrow will display.
Appointment Stats County Dropdown list	Clicking a **County** in the dropdown list will filter data in the Appointment Stats tile for the selected County. The user will only see Counties that the user has been approved to see.
Appointment Graph	The user will be able to use their mouse to hover over the data in the graph to see the appointment statistics based on the selected location.

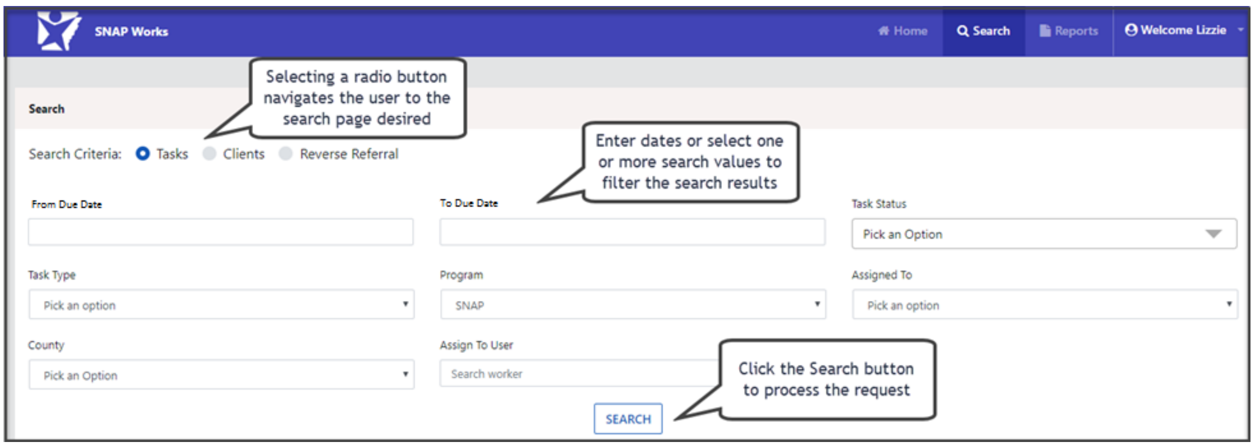
5 Search Tasks Page

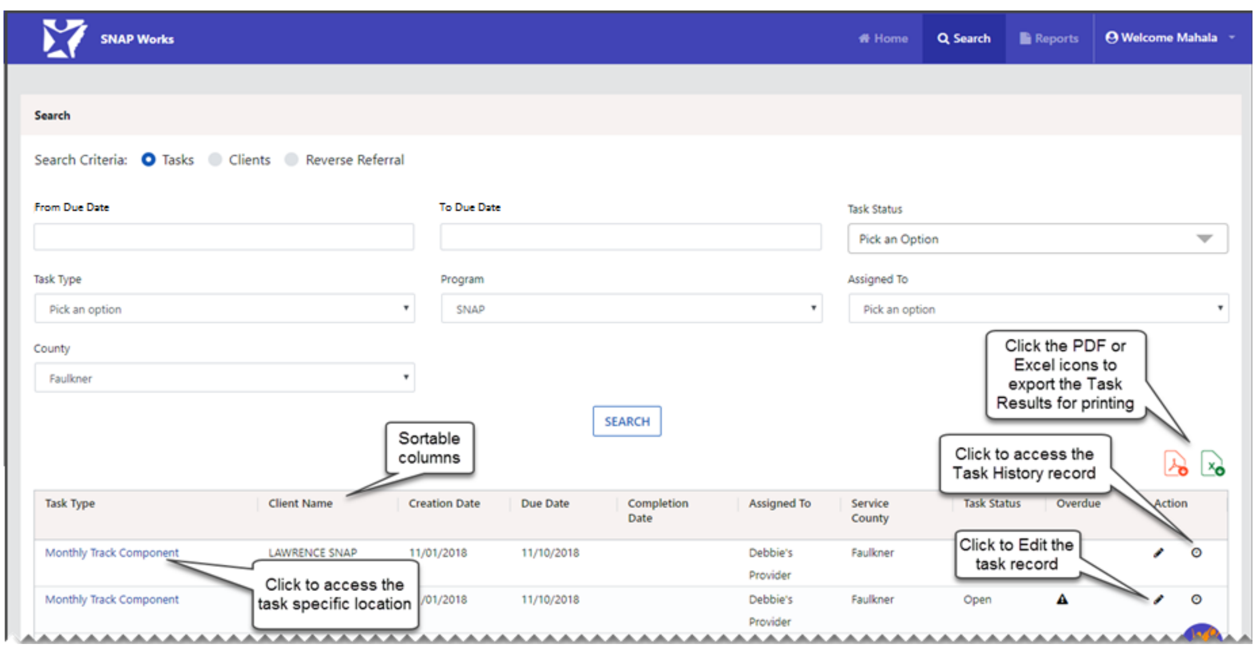
5.1 Overview

The Search Task page displays when a user clicks the **Search** button in the Global Menu. This allows the user to be able to monitor and complete the work activities on their caseload.

5.2 Screenshot

Below is a screenshot of the Search Task page and the Task Results grid that displays once the search has been completed.





5.3 Controls

The following table details the controls that are present on the Search Tasks Page. Each control includes a description and control type.

Controls	Description	Control Type
Search Criteria	Radio buttons that allow the user to select type of Search	Always enabled
From Due Date	Text box. Format: **mm/dd/yyyy**. User will be able to limit the results by using a date range. ***New Feature:*** 'From Date' to 'From Due Date'	Always enabled
To Due Date	Text box. Format: **mm/dd/yyyy**. User will be able to limit the results by using a date range. ***New Feature:*** 'To Date' to 'To Due Date'	Always enabled
Task Status	Dropdown list that filters the results by Status	Always enabled
Task Type	Dropdown list that filters the results by Task Type	Always enabled
Program	Dropdown list that filters the results by Program	Always enabled
Assigned To	Dropdown list that filters the results by Provider or County Office	Always enabled
County	Dropdown list that filters the results by County	Always enabled
Assign to User	Dropdown list that filters by County Office Users	Always enabled
Search	Button that submits a request to the ***AR Works*** database to return results based on the filter(s) selected	Always enabled
Task Results	Table containing static, informational text and hyperlinks	N/A
Task Type	Text hyperlinks that redirect the user to the appropriate location based on Task Type. See Appendix A – Task Matrix for more information.	Always enabled
	Edit button, identified as a "pencil"	Always enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

5.4 User Actions

The following table details the actions that the user can take on the Search Tasks Page. Each action includes a description.

User Action	Description
Search	Click the **Search** button for tasks. The results will be based on the search filters the user selected, such as by date range (**From Due Date** and **To Due Date** text boxes). At least one filter is required to search for records. ***NOTE:*** *Program defaults to SNAP to meet the minimum filter criteria*.
Task Grid	Upon completing a successful search, the page will display a grid of records that match the filters that were used to conduct the search. The grid will paginate at every 10 records.
Task Type	Click on a **Task Type** hyperlink on a client record to go to the appropriate page to complete the case management work needed for the client. Each task type (e.g., Good Cause Request) based on the task type selected. For detailed information on how to process the task, refer to Appendix A – Task Matrix for more information.
Edit	Click the **Pencil** icon to go to the Edit Task page. This allows the DHS user to assign the task to someone, or to change the status of a task.
Audit	Click the **Clock** icon to go to the Task History page for the specified task selected. This will allow the user to see all of the modifications that have occurred with the task over the course of its history.
Pagination	Click the Beginning, Back, Forward, or End buttons to navigate through the list of tasks.

Note: *Searching by County will result in Client records returning for the Service County the Client's SNAP record resides in. The Client's residential county may not match.*

6 Search Clients Page

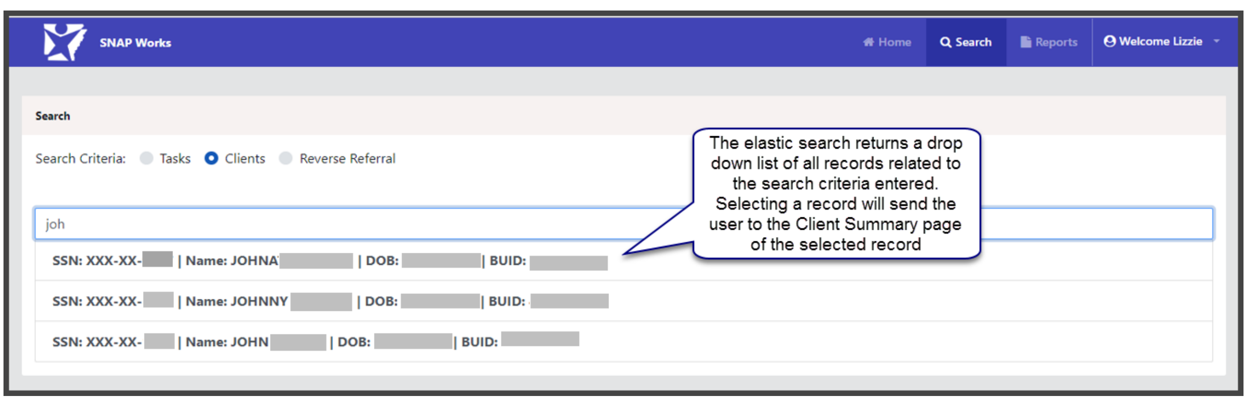
6.1 Overview

The Search Clients Page can be accessed by clicking the **Search** button in the top navigation menu. Select the **Clients** radio button to access the page. The system will only display active ***SNAP Works*** participants that the user is allowed to view.

> ***Note:*** *Access to view a client record is based on the User's assigned county or counties. In the event that a DHS User has a change in county coverage, contact the System Coordinator to update the location settings.*

6.2 Screenshot

Below are screenshots of the Search Client page. To search for a client, type information into the Search text box. The system will display a dropdown list of available clients based on the data entered.



6.3 Controls

The following table details the controls that are present on the Search Clients Page. Each control includes a description and control type.

Controls	Description	Control Type
Search Criteria	Radio Button	Always enabled

Search text box	Elastic Search	Always enabled

6.4 User Actions

The following table details the actions that the user can take on the Search Tasks Page. Each action includes a description.

User Action	Description
Search Criteria	Click the **Client** radio button to access the Search Clients page.
Search	Enter data in the **Search** text box. As values are entered, the system will conduct an elastic search of the database based on the following criteria: • First Name • Last Name • Date of Birth (format: **mm/dd/yyyy**) • SNAP Budget Unit ID (format: **123456**)
Select record	Click on a record from the **Search** dropdown results. The user will be sent to the Client Summary page for the selected client.

7 Search Reverse Referral Page

7.1 Overview

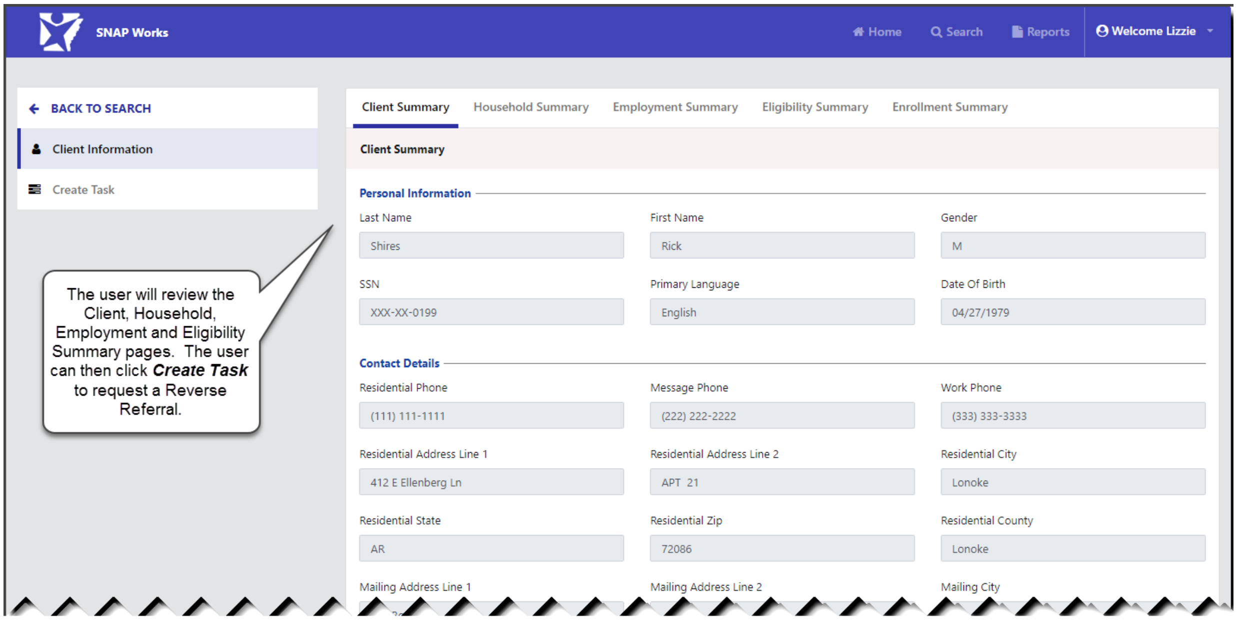
The Search Reverse Referral Page can be accessed by selecting the **Search** button in the top navigation menu. Click the **Reverse Referral** radio button to access the page. The system will only display active SNAP participants that are eligible to become a volunteer based on the criteria below:

Reverse Referral Criteria:

Service Program = SNAP
SNAP Budget Certification End Date >= Current Date
Household Participation Status = Active
Budget Unit Profile = Not a Disabled Household
Member Status = Active
Age >= 18 Years Old
SNAP Case = Open and Approved
Budget Wizard = At least one budget has been submitted to mainframe during certification period

7.2 Screenshot

Below is a screenshot of the Search Reverse Referral Page. Once the user enters a Social Security Number and clicks the **Search** button, the user will be sent to the Client Summary if the number entered is a valid search.



7.3 Controls

The following table details the controls that are present on the Search Reverse Referral Page. Each control includes a description and control type.

Controls	Description	Control Type
Search Criteria	Radio Button	Always enabled

7.4 User Actions

The following table details the actions that the user can take on the Search Reverse Referral Page. Each action includes a description.

User Action	Description
Search	Click the **Search** button once a Social Security Number has been entered in the **Search SSN** text box. The ***SNAP Works*** application display pertinent information needed to determine whether the person whom the SSN was entered is eligible to become a volunteer participant. The following information will display based on the Reverse Referral criteria listed in Section 7.1: • Personal and contact information related to the owner of the SSN entered • List of people who currently live in the household according to the SNAP record, including their Work Participation Status and other characteristics about the household members • List of employment activities that has been captured in ***ANSWER*** • SNAP Certification information, including the certification period and SNAP benefit amount

8 Client Information – Client Summary Page

8.1 Overview

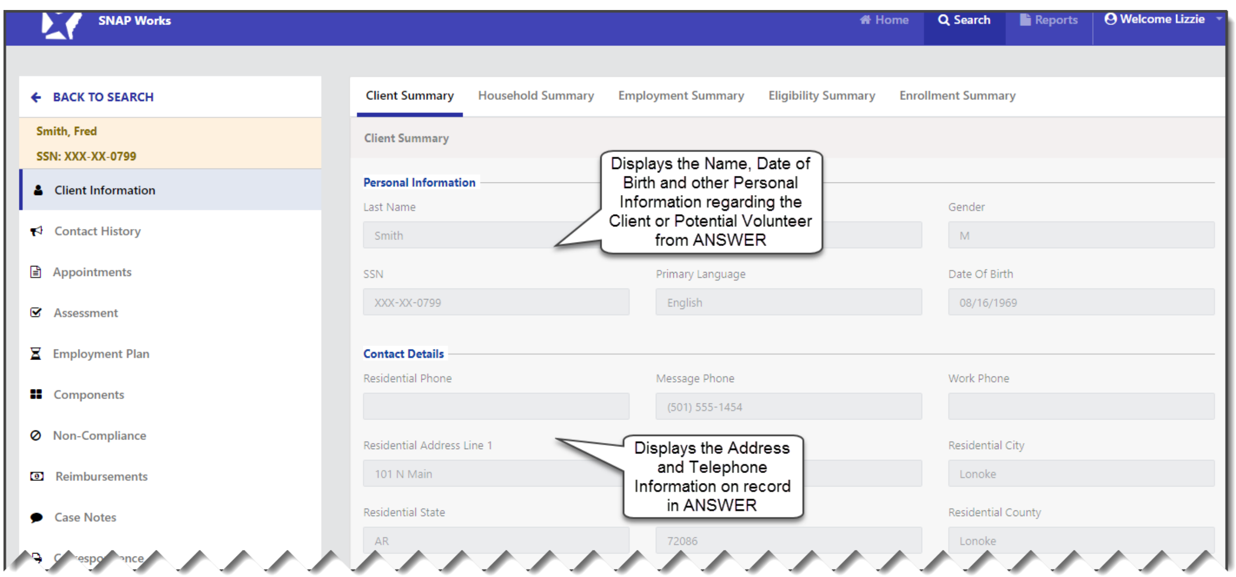
The Client Summary page allows the user to be able to view contact information related to the client or potential volunteer. Information such as Name, Date of Birth, and Address information will display from the ***ANSWER*** application. The Provider and System Coordinator will be able to add additional contact details to the record *if* the Client's record is in an *Open* or *Pending* status. The Additional Contact Details section will not be available when the user accesses the record from the Search Reverse Referral page.

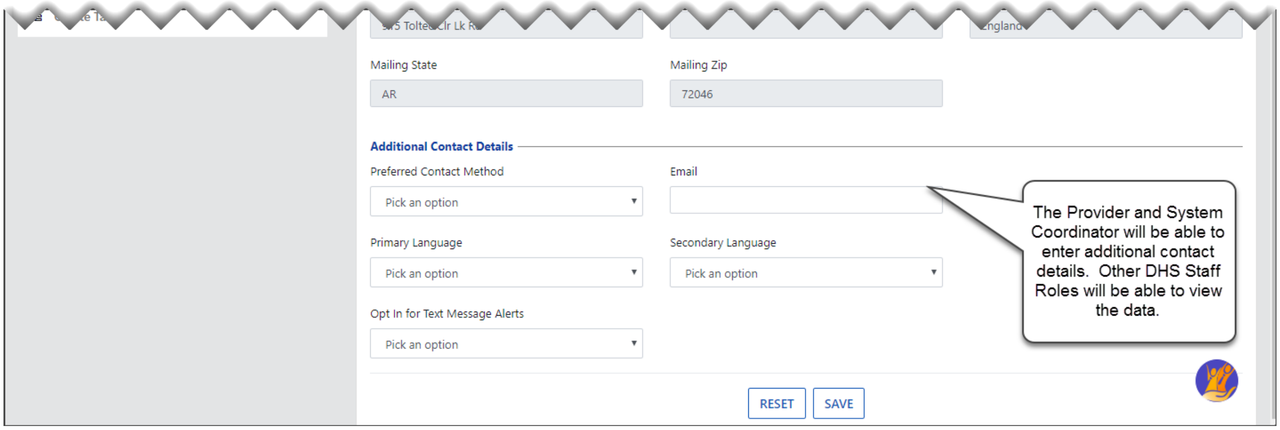
The Provider and System Coordinator will be able to edit these records; all other users will have read access only.

8.2 Screenshot

Below is a screenshot of the Client Summary page. The page contains three sections:

- Personal Information
- Contact Details
- Additional Contact Details





8.3 Controls

The following table details the controls that are present on the Client Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Last Name	Text box. Displays the current Last Name of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
First Name	Text box. Displays the current First Name of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Gender	Text box. Displays the Gender of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
SSN	Text box. Displays the Social Security Number (masked XXX-XX-####) of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Primary Language	Text box. Displays the Primary Language of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Date of Birth	Text box. Displays the Date of Birth of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Residential Phone	Text box. Displays the current Residential Phone Number of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Message Phone	Text box. Displays the current Message Phone Number of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Work Phone	Text box. Displays the current Work Phone Number of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only

Residential Address Line 1	Text box. Displays the current Residential Address Line 1 data of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Residential Address Line 2	Text box. Displays the current Residential Address Line 2 data of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Residential City	Text box. Displays the current Residential City of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Residential State	Text box. Displays the current Residential State of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Residential Zip	Text box. Displays the current Residential Zip Code of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Residential County	Text box. Displays the current Residential County of the client or potential volunteer from the ***ANSWER*** application. Read only	Display only
Mailing Address Line 1	Text box. Displays the current Mailing Address Line 1 data of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Mailing Address Line 2	Text box. Displays the current Mailing Address Line 2 data of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Mailing City	Text box. Displays the current Mailing City of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Mailing State	Text box. Displays the current Mailing State of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Mailing Zip	Text box. Displays the current Mailing Zip Code of the client or potential volunteer from the ***ANSWER*** application, if there is data available. Read only	Display only
Preferred Contact Method	Dropdown list. Provider or System Coordinator will be able to select the client's preferred contact method	Conditionally enabled
Email	Text Box. Provider or System Coordinator will be able to enter an Email address for the client record. The field requires the email address to be in a valid email format.	Conditionally enabled
Primary Language	Dropdown list. Provider or System Coordinator will be able to select the Primary Language for the client. Defaults to ***English***	Conditionally enabled

Secondary Language	Dropdown list. Provider or System Coordinator will be able to select the Secondary Language for the client	Conditionally enabled
Opt In for Text Message Alerts	Dropdown list. Provider or System Coordinator will be able to select a value to allow the provider to send text messages to the client.	Conditionally enabled
Reset	Button. Resets the page to a blank or previously saved status	Conditionally enabled
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	Conditionally enabled

8.4 User Actions

The following table details the actions that the user can take on the Client Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client or potential volunteer's Client Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment, or Perform Assessment* and then click the **Client Information** hyperlink in the left navigation menu • Search for a Client and select the client record from the dropdown list. When the grid loads, click the **Client ID** hyperlink. The user will be automatically taken to the Client Summary page • Search for a SSN in the Search Reverse Referral page. If the SSN exists, the user will be automatically taken to the Client Summary page
Additional Contact Details	The Additional Contact Details fields will be available for editing when the Client is in a *Pending* or *Open* status. The Provider or System Coordinator can complete any of the Additional Contact Details fields. Click the **Save** button to save the record.
Email	Email addresses that are added to the record must be in a correct email address format. Examples include: • john.smith@email.com • johnsmith@email.com

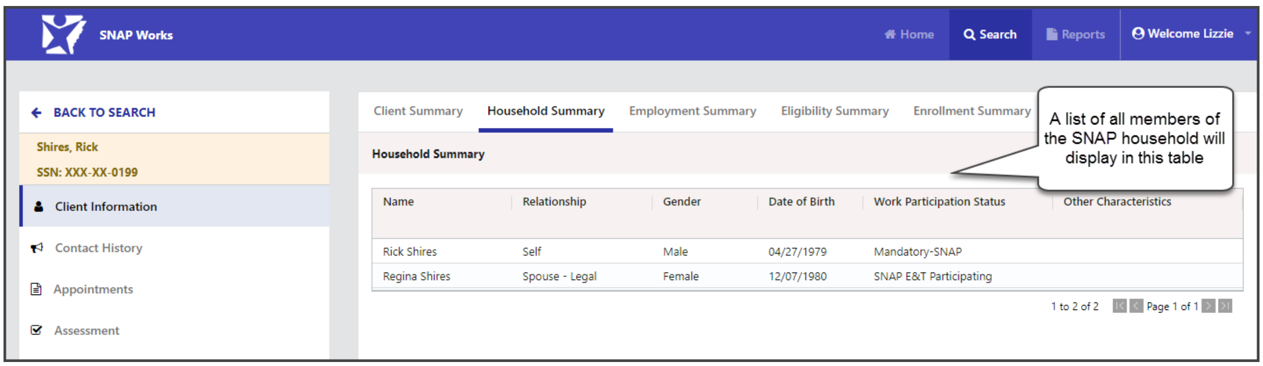
9 Client Information – Household Summary Page

9.1 Overview

The Household Summary screen displays a list of all the people that are in the SNAP household. This page will assist the Provider in determining the household dynamics connected to the client.

9.2 Screenshot

Below is a screenshot of the Household Summary page.



9.3 Controls

The following table details the controls that are present on the Household Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Household Summary Grid	Grid that displays data related to all household members in the client's SNAP record	N/A
Name	Displays the household member's First and Last Name	Display only
Relationship	Displays the relationship of each household member ***NOTE**:* This is the relationship found in the ***ANSWER*** application, not the relationship to the client. *Example*: The Casehead of the SNAP Case will display the relationship *Self*. If the client is the spouse of the casehead, the relationship will display as *Spouse – Legal Ceremony* or *Spouse – Common Law*	Display only

Gender	Displays the gender of each household member	Display only
Date of Birth	Displays the date of birth for each household member	Display only
Work Participation Status	Displays the current Work Participation Status assigned to each household member	Display only
Other Characteristics	Displays all of the assigned General Client Characteristics for each household member, if there is data available	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

9.4 User Actions

The following table details the actions that the user can take on the Household Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client or potential volunteer's Client Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Client Information** hyperlink in the left navigation menu. Click the **Household Summary** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the **Client ID** hyperlink. The user will be automatically taken to the Client Summary page. Click the **Household Summary** tab in the top navigation menu. • Search for a SSN in the Search Reverse Referral page. If the SSN exists, the user will be automatically taken to the Client Summary page. Click the **Household Summary** tab in the top navigation menu.

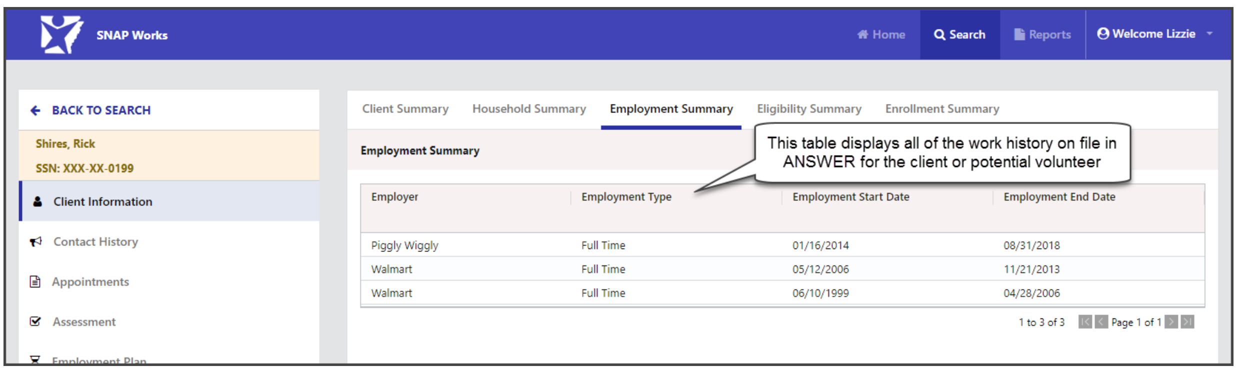
10 Client Information - Employment Summary Page

10.1 Overview

The Employment Summary page displays a list of all of the employment records on file with the ***ANSWER*** application. This will allow the Provider to view the when the provider last worked and the type of employment the client had.

10.2 Screenshot

Below is a screenshot of the Employment Summary page



10.3 Controls

The following table details the controls that are present on the Employment Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Employment Grid	Grid that displays all employment records that have been entered in the client's ***ANSWER*** client record	N/A
Employer	Displays the name of each employer that has been recorded in ***ANSWER*** in the client record	Display only
Employment Type	Displays the Employment Type for each employment record, if data exists	Display only
Employment Start Date	Displays the Employment Start Date for each employment record, if data exists	Display only
Employment End Date	Displays the Employment End Date for each employment record, if data exists	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

10.4 User Actions

The following table details the actions that the user can take on the Employment Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client or potential volunteer's Client Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Client Information** hyperlink in the left navigation menu. Click the **Employment Summary** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the **Client ID** hyperlink. The user will be automatically taken to the Client Summary page. Click the **Employment Summary** tab in the top navigation menu. • Search for a SSN in the Search Reverse Referral page. If the SSN exists, the user will be automatically taken to the Client Summary page. Click the **Employment Summary** tab in the top navigation menu.

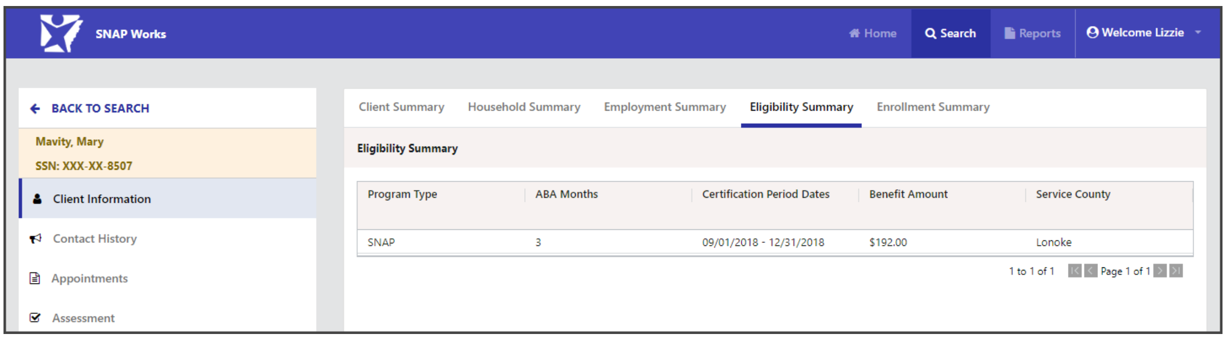
11 Client Information – Eligibility Summary Page

11.1 Overview

The Eligibility Summary page will detail information related to the client's SNAP eligibility. This page displays the eligibility records on file within the ***ANSWER*** application.

11.2 Screenshot

Below is a screenshot of the Eligibility Summary page.



11.3 Controls

The following table details the controls that are present on the Eligibility Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Eligibility Summary Grid	Grid that displays all eligibility information related to the Client's SNAP case	N/A
Program Type	Name of the Program the client is enrolled into ***SNAP Works*** through	Display only
ABA Months	Number of Able Bodied Adults month count in ***SNAP Works***. No data will display in this field for Volunteers	Display only
Certification Period Dates	The Begin and Ending Dates that the Client is currently certified. Format **mm/dd/yyyy – mm/dd/yyyy**	Display only
Benefit Amount	The amount of SNAP benefits that the Client currently receives	Display only
Service County	The county in which the Client is receiving their SNAP Assistance through. The Service County and the County that the Client lives in may not match	Display only

Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

11.4 User Actions

The following table details the actions that the user can take on the Eligibility Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client or potential volunteer's Client Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Client Information** hyperlink in the left navigation menu. Click the **Eligibility Summary** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the **Client ID** hyperlink. The user will be automatically taken to the Client Summary page. Click the **Eligibility Summary** tab in the top navigation menu. • Search for a SSN in the Search Reverse Referral page. If the SSN exists, the user will be automatically taken to the Client Summary page. Click the **Eligibility Summary** tab in the top navigation menu.

12 Client Information – Enrollment Summary Page

12.1 Overview

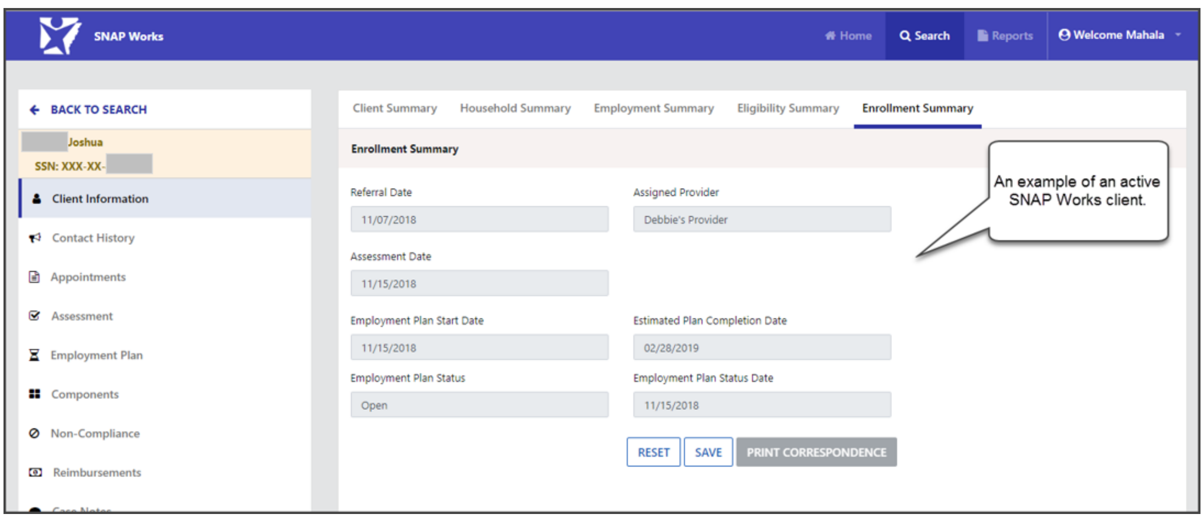
The Enrollment Summary page displays a compilation of data from throughout the ***SNAP Works*** application, to show an overall progress of the client's record. Additionally, the Provider and System Coordinator will use this page to close the case record once the client is no longer participating in the ***SNAP Works*** program.

In the event that the case was closed in error, the System Coordinator will be able to reinstate the record from this page.

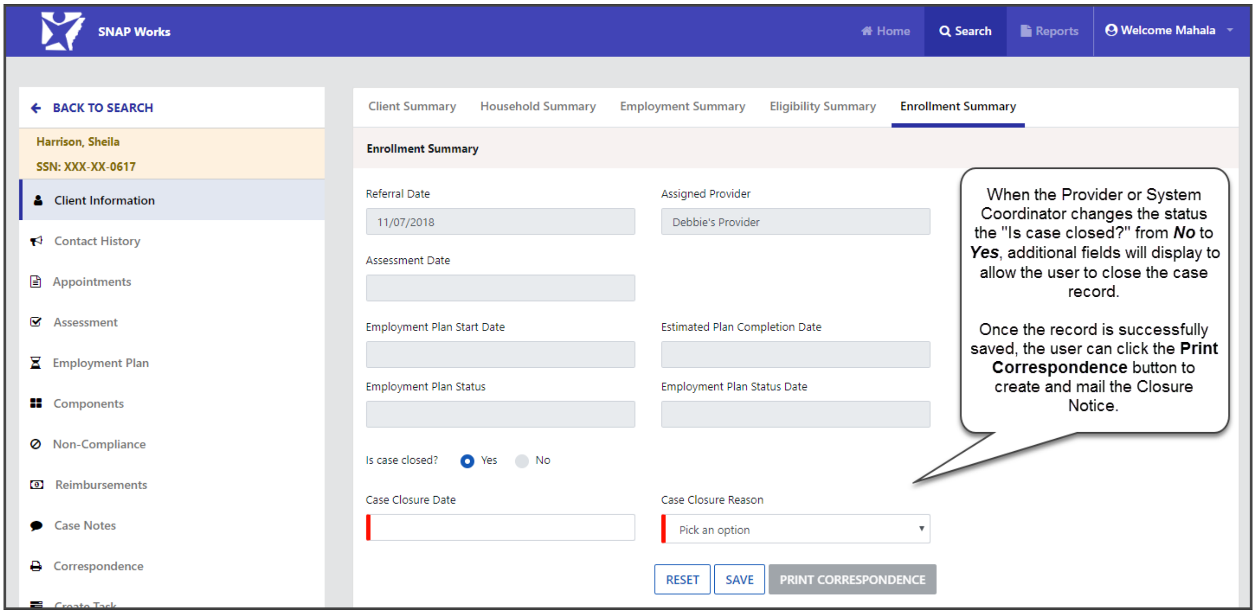
The Provider and System Coordinator will be able to create these records; all other users will have read access only.

12.2 Screenshot

Below are two screenshots of the Enrollment Summary page. In the first screen shot, the client is in an *Active* status.



The second screenshot shows what the page will look like when the user is in the process of closing the case record.



12.3 Controls

The following table details the controls that are present on the Enrollment Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Referral Date	Text box. Displays the date the most recent referral was received. Read only	Display only
Assigned Provider	Elastic Search. Allows the System Coordinator to assign the Client to a different provider	Conditionally enabled
Assessment Date	Text box. Displays the most recent Assessment Date. If an Assessment has not been conducted, the field will be blank. Read only	Display only
Employment Plan Start Date	Text box. Displays the most recent Employment Plan's Start Date. If an Employment Plan has not been created, the field will be blank. Read only	Display only
Estimated Plan Completion Date	Text box. Displays the most recent Employment Plan's Estimated Completion Date. If an Employment Plan has not been created, the field will be blank. Read only	Display only
Employment Plan Status	Text box. Displays the most recent Employment Plan's Status. If an Employment Plan has not been created, the field will be blank. Read only	Display only
Employment Plan Status Date	Text box. Displays the date the Employment Plan's Status was set. If an Employment Plan has not been created, the field will be blank. Read only	Display only
Is case closed?	Radio buttons. Allows the Provider or System Coordinator to close the client record	Conditionally enabled

Case Closure Date	Text box. Displays the date the client's record was closed. This field will not display if the case is in an *Open* status. Read only	Display only
Case Closure Reason	Text box. Displays the Reason the client's record was closed. This field will not display if the case is in an *Open* status. Read only	Display only
Is re-activate case?	Radio buttons. Allows the System Coordinator to reinstate a closed case	Conditionally enabled
Reset	Button. Resets the page to the last successfully saved values	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A
Print Correspondence	Button. Redirects the Provider or System Coordinator to the Correspondence page in the client record	N/A

12.4 User Actions

The following table details the actions that the user can take on the Enrollment Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client or potential volunteer's Client Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Client Information** hyperlink in the left navigation menu. Click the **Enrollment Summary** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the **Client ID** hyperlink. The user will be automatically taken to the Client Summary page. Click the **Enrollment Summary** tab in the top navigation menu. • Search for a SSN in the Search Reverse Referral page. If the SSN exists, the user will be automatically taken to the Client Summary page. Click the **Enrollment Summary** tab in the top navigation menu.
Referral Date	The user will be able to see the most recent referral date from the ***ANSWER*** application. This will be the date that the batch job ran in the ***ANSWER*** application sending a *Referral* task to the Provider to notify them of the new client.
Assigned Provider	The system will display the Provider that is currently assigned to the client record. The System Coordinator can reassign the client, as needed.

Assessment Date	The date the most recent assessment was created will display. As new assessments are created, the date will be updated.
Employment Plan Start Date	The Employment Plan Start Date on the most recent Employment Plan will display in this field. When a new Employment Plan is created, the field will update the new date.
Estimated Plan Completion Date	The Estimated Plan Completion Date will display the current date on file in the Employment Plan. When the Completion Date is updated on the Employment Plan *or* a new Employment Plan is created, the date will update to show the new date.
Employment Plan Status	The system will display the status of the most recent Employment Plan. When the status is changed on the Employment Plan, the new status will display in this field.
Employment Plan Status Date	The date that the Employment Plan status was successfully updated will display. When an existing plan is closed, or a new plan is created, the new date will display.

13 Contact History Page

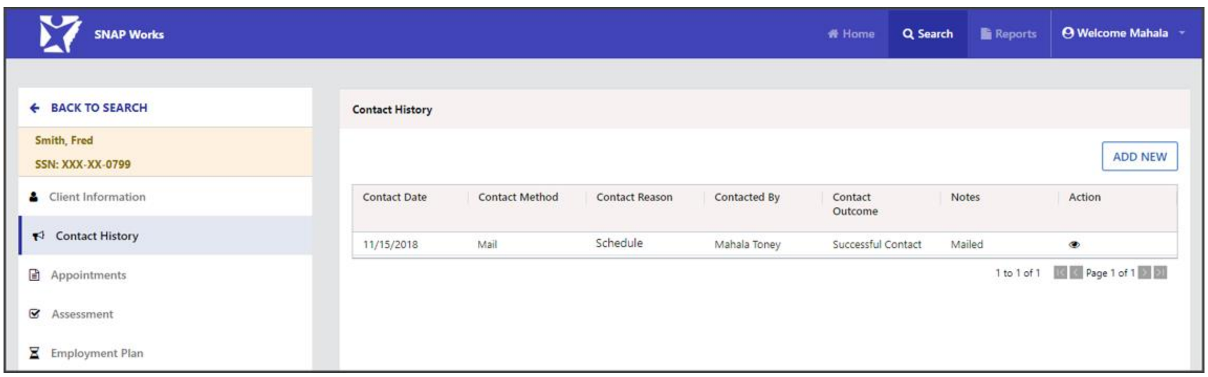
13.1 Overview

The Contact History page will contain a grid detailing all of the contacts that have been attempted. The user will only be able to create and view a contact. Contact records cannot be edited.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

13.2 Screenshot

Below is a screenshot of the Contact History page



13.3 Controls

The following table details the controls that are present on the Contact History Page. Each control includes a description and control type.

Controls	Description	Control Type
Add New	Button. When selected, the user is sent to a blank Contact Details page to allow the user to create a new contact record	Always enabled
Contact History Grid	Grid that displays all a history of all contact records that were created related to the Client's ***SNAP Works*** case	N/A
Contact Date	Date the contact was completed	Display only
Contact Method	The method used to complete the contact	Display only
Contact Reason	The reason why the contact was made with the client	Display only
Contacted By	The person who completed the contact	Display only

Contact Outcome	The status of the contact	Display only
Notes	Displays any documentation that was added to the contact record, if available	Display only
	View button, identified as an “eye” that redirects the user to a read-only version of the record	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

13.4 User Actions

The following table details the actions that the user can take on the Contact History Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client Contact History page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Contact History** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Contact History** hyperlink in the left navigation menu.
Create a contact record	Providers and System coordinators will be able to click the **Add New** button to access a blank Contact Details screen to create a new record
Viewing an existing contact record	Click the **Eye**  icon on a record in the grid. The user will be redirected to a read only version of the Contact Details page.

14 Contact Details Page

14.1 Overview

The Contact Details page allows the user to create a contact record. The record will identify how and when the contact was made, the reason for contact, and the outcome of the contact.

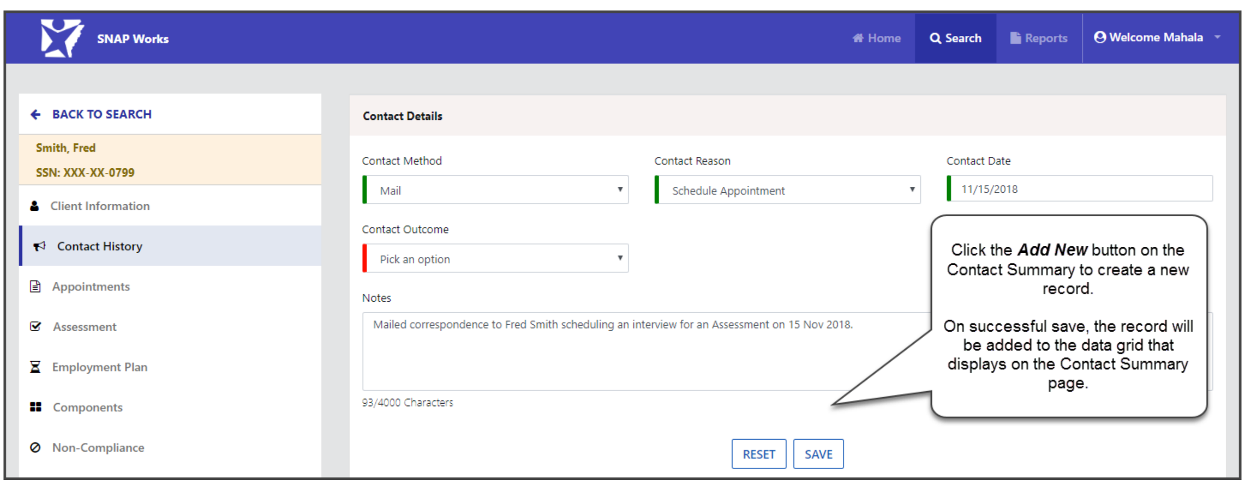
> **TIP:** When completing a Contact using the method of *Mail*, procedurally, list the outcome as *Successful Contact.*
>
> If the mail is returned as undeliverable, create a new contact record and add a note indicating that the previous contact was unsuccessful.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

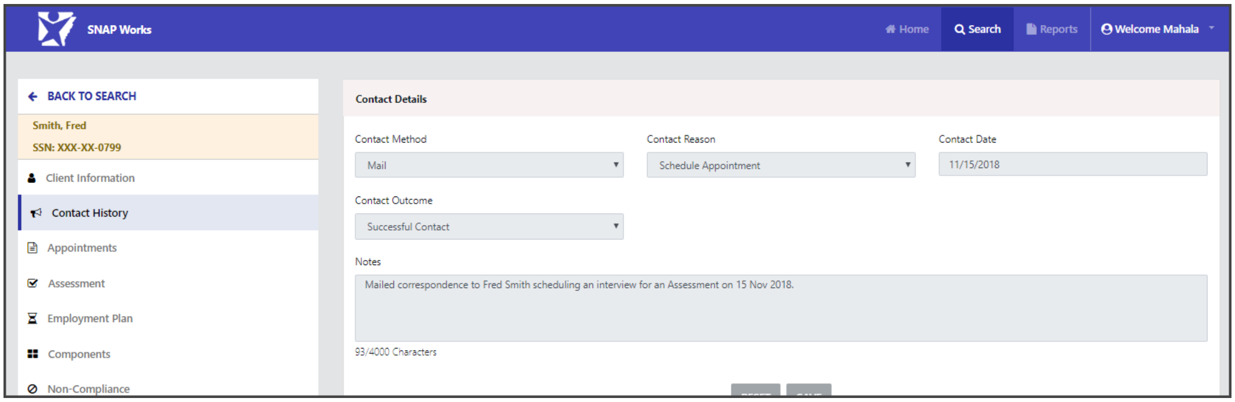
14.2 Screenshot

Below are screenshots of the Contact Details page.

The screenshot below illustrates how the page will display when the user is creating the record.



This is an example of Contact Details screen once the record has been successfully saved.



14.3 Controls

The following table details the controls that are present on the Create Contact Page. Each control includes a description and control type.

Controls	Description	Control Type
Contact Method	Dropdown list. Allows the user to select the how the contact was made with the client. Required	Always enabled
Contact Reason	Dropdown list. Allows the user to choose the reason why the contact was made. Required	Always enabled
Contact Date	Text box. Allows for a past or current date. Format: ***mm/dd/yyyy*** Required	Always enabled
Contact Outcome	Dropdown list. Allows the user to select the most appropriate outcome for the contact record. Required	Always enabled
Notes	Text box. Allows the user to enter up to 4000 alpha-numeric characters to describe the reason for contact	Always enabled
Reset	Button. Resets the page to a blank status	Always enabled
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	Always enabled

14.4 User Actions

The following table details the actions that the user can take on the Create Contact Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client's Contact Details page, the user can access the client record by any of the following methods:

	• Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Contact History** hyperlink in the left navigation menu.
	  o Click Add New, to create a new record
	  o Click the **Eye** icon in the grid to view an existing record
	• Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Contact History** hyperlink in the left navigation menu.
	  o Click Add New, to create a new record
	  o Click the **Eye** icon in the grid to view an existing record

Creating a Contact Record	To create a contact record, complete the following information and click the **Save** button: • Contact Method • Contact Reason • Contact Date • Contact Outcome Notes may be added to provide clarity on the reason for the contact.

15 Schedule Appointment Page

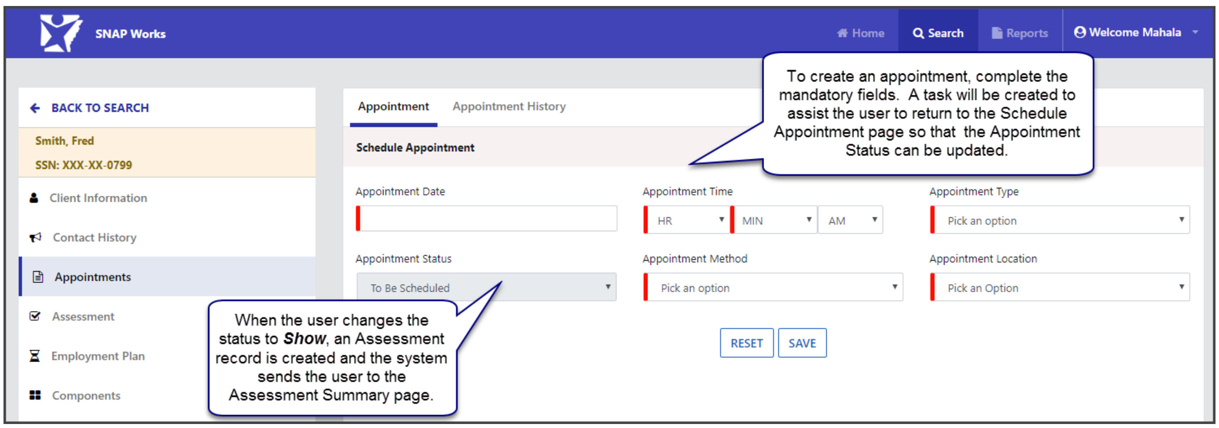
15.1 Overview

The Schedule Appointment page is used to schedule appointments with the client, and to update the record to indicate if the client attended the appointment.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

15.2 Screenshot

Below is a screenshot of the Schedule Appointment page



15.3 Controls

The following table details the controls that are present on the Schedule Appointment Page. Each control includes a description and control type.

Controls	Description	Control Type
Appointment Date	Text box. Allows for a current or future date. Format: ***mm/dd/yyyy*** Required	Always enabled
Appointment Time	Dropdown list. Allows the user to enter the Hour, Minutes and Am/PM for the time for the appointment. Required	Always enabled
Appointment Type	Dropdown list. Allows the user to select the type of appointment that is being scheduled. Required	Always enabled
Appointment Status	Dropdown list. When creating an appointment, the Appointment Status defaults to ***To Be Scheduled*** and cannot be updated. Once the appointment is scheduled, the status is set to ***Scheduled***. The Provider and System Coordinator will be able to change the status when editing the Appointment.	Conditionally enabled

	When the user updates the status of the Appointment to ***Show***, an Assessment record will be created and the user will be automatically sent to the Assessment Summary page.	
Appointment Method	Dropdown list. Allows the user to be able to select how the appointment will be conducted. Required	Always enabled
Appointment Location	Dropdown list. Allows the user to select the user's location that the appointment will occur	Always enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Appointment record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

15.4 User Actions

The following table details the actions that the user can take on the Schedule Appointment Page. Each action includes a description.

User Action	Description
Navigation to create a record	To navigate to a client Appointment page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Appointments** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Appointments** hyperlink in the left navigation menu.
Navigation to update a record	To update an existing Appointment, search for the client's Appointment task by any of the following methods: • Click the Search Tasks page and search for an Appointment task that have the task status *Open* or *In Progress*. Click the **Appointment** task type hyperlink on a selected record. The user will be taken to the Appointment record • Search for a client. Once the data grid loads on the Search Clients page, click the **Search Tasks** button to display the list of tasks associated to the client. Click the **Appointment** task type hyperlink on an *Open* or *In Progress* task record. The user will be taken to the Appointment record
Creating an Appointment	Complete the following fields and click the **Save** button: • Appointment Date • Appointment Time • Appointment Type • Appointment Method • Appointment Location

Rescheduling an appointment	The user will be able to reschedule the appointment by making changes to the any of the fields used to create the record. In addition, change the Appointment Status to *Rescheduled* and click the **Save** button.

Updating the Appointment Status	The user can update the appointment status to close the Appointment by selecting one of the two following options:
	• Show
	  ○ When the user saves the record, the task will be closed and the user will be taken to the Assessment Summary screen automatically to start completing the Assessment.
	• No Show
	  ○ When the user saves the record, the task will be closed and the user will be taken to the Appointment History page

16 Appointment History Page

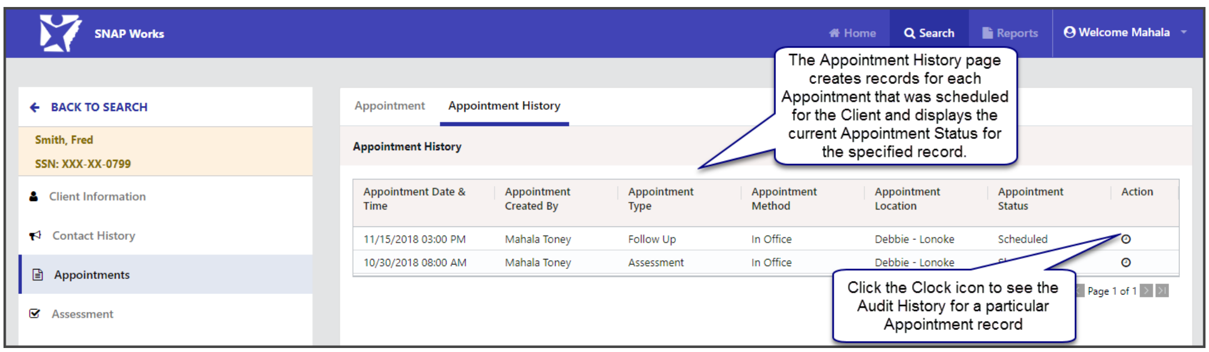
16.1 Overview

The Appointment History page displays a list of all of the Appointments that have been scheduled for a client, detailing the date and time of the appointment, as well as to if the client attended the appointment.

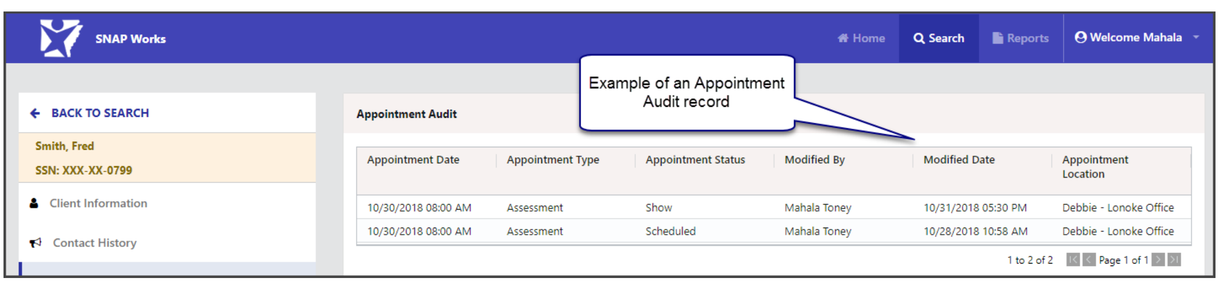
This page is read only for all users.

16.2 Screenshot

Below is a screenshot of the Appointment History page.



When the user clicks the icon, the user is taken to the Appointment Audit page. Below is an example of the page.



16.3 Controls

The following table details the controls that are present on the Appointment History Page. Each control includes a description and control type.

Controls	Description	Control Type
Appointment History Grid	Grid that displays all a history of all Appointment records that were created related to the Client's ***SNAP Works*** case	N/A
Appointment Date & Time	Displays the Date and Time of the scheduled appointment	Display only

Appointment Created By	Displays the name of the person who created the Appointment record	Display only
Appointment Method	Displays the method of how the appointment was intended to be conducted	Display only
Appointment Location	Displays the location of the appointment	Display only
Appointment Status	Displays the status of the appointment	Display only
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

16.4 User Actions

The following table details the actions that the user can take on the Appointment History Page. Each action includes a description.

User Action	Description
Navigation	To navigate to a client Appointment History page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Appointments** hyperlink in the left navigation menu. Click the **Appointment History** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Appointments** hyperlink in the left navigation menu. Click the **Appointment History** tab in the top navigation menu.
Navigation to Appointment Audit page	Click the **Clock** icon on any record displaying in the Appointment History grid. The user will be sent to the Appointment Audit page.

17 Assessment – Assessment Summary Page

17.1 Overview

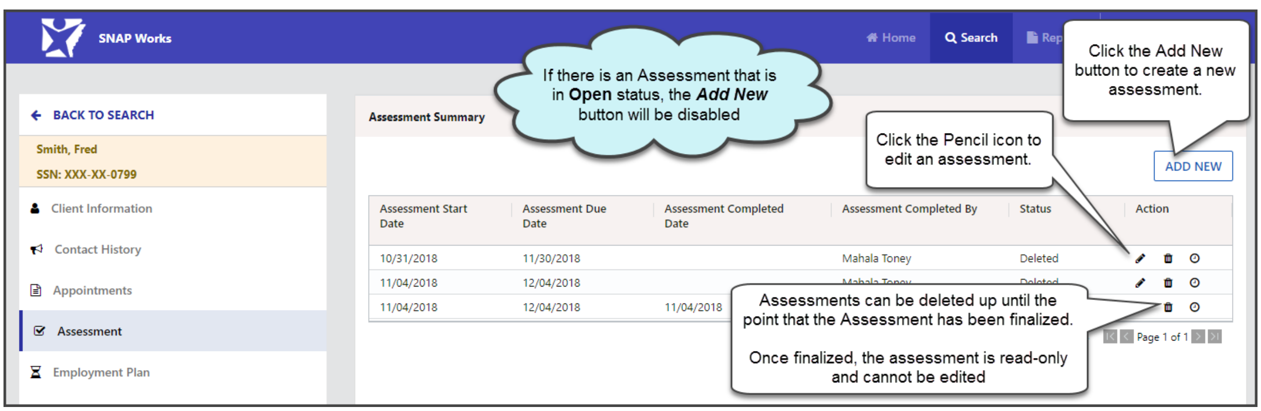
The Assessment Summary displays a grid of all of the Assessments that have been created over time. Providers and System Coordinators will be able to create, edit and delete assessments. All other users will only be able to view the Assessment pages associated to the record in the Assessment Summary grid.

> **TIP:** A new Assessment cannot be completed if there is an *Open* Assessment.
>
> Assessments that have been finalized cannot be deleted.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

17.2 Screenshot

Below is a screenshot of an Assessment Summary page.



17.3 Controls

The following table details the controls that are present on the Assessment Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Add New	Button. When selected, the user is sent to a blank Education & Certifications page to allow the user to create a new Assessment record	Conditionally enabled

	For the Provider and System Coordinator, the Add New Button will only be enabled when there is not an *Open* Assessment Summary. The button will be disabled for all other roles.	
Assessment Grid	Grid that displays all a history of all of the Assessments that are to the Client's ***SNAP Works*** case	N/A
Assessment Start Date	The date that the Assessment was initiated. Format: ***mm/dd/yyyy***	Display only
Assessment Due Date	The date that the Assessment is due to be completed, based on the date the Assessment was initiated. Format: ***mm/dd/yyyy***	
Assessment Completed Date	The date the Assessment was finalized. A date will not display if the Assessment was not finalized. Format: ***mm/dd/yyyy***	Display only
Assessment Completed By	The name of the person who last updated the Assessment	Display only
Status	The current status of the Assessment.	Display only
	Edit button, identified as a "pencil" ***NOTE:*** Only Providers and System Coordinators will be able to update records. Assessments that have been finalized or deleted will not allow updates	Always enabled
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

17.4 User Actions

The following table details the actions that the user can take on the Assessment Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Assessment Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu.
Navigation to create a new Assessment	To create a new assessment, click the **Add New** button. The user will be taken to the Education & Strengths page to start entering the Assessment details.

Navigation to view or edit an existing Assessment	To view or edit an existing assessment, click the **Pencil** icon. The user will be taken to the Education & Strengths page. Providers and System Coordinators will be able to edit *Open* assessments. All other roles will only be able to view the records. ***NOTE:*** Once an assessment has been finalized, the form will no longer be editable.
Navigation view an Assessment Audit record	To view an Assessment Audit record, click the **Clock** icon. The user will be sent to the Assessment Audit page, allowing the user to see a history of who worked on the Assessment.
Deleting an Assessment	Click the **Trash Can** icon to delete an Assessment record. The record will display in the Assessment Summary grid with the status as *Deleted*. Once a record has been deleted, the user will no longer be able to access the pages that comprise the Assessment record. ***NOTE:*** Assessments can be deleted at any stage of completion; however, once the user successfully finalizes the record, which changes the status to *Completed*, the record can no longer be deleted. For more information related to finalizing an assessment, refer to section Assessment – Work History for details.

18 Assessment – Education & Certifications Page

18.1 Overview

The Education & Certifications page captures the school(s) the client attended, any certificates they received and displays any education records that are available from the ***ANSWER*** application.

In the Certification section, depending on the License or Certification selected, additional information will be gathered related to the certification. When the user clicks any of the following License/ Certification selections, the Type column will become a dropdown list, requiring more information related to the License or Certification.

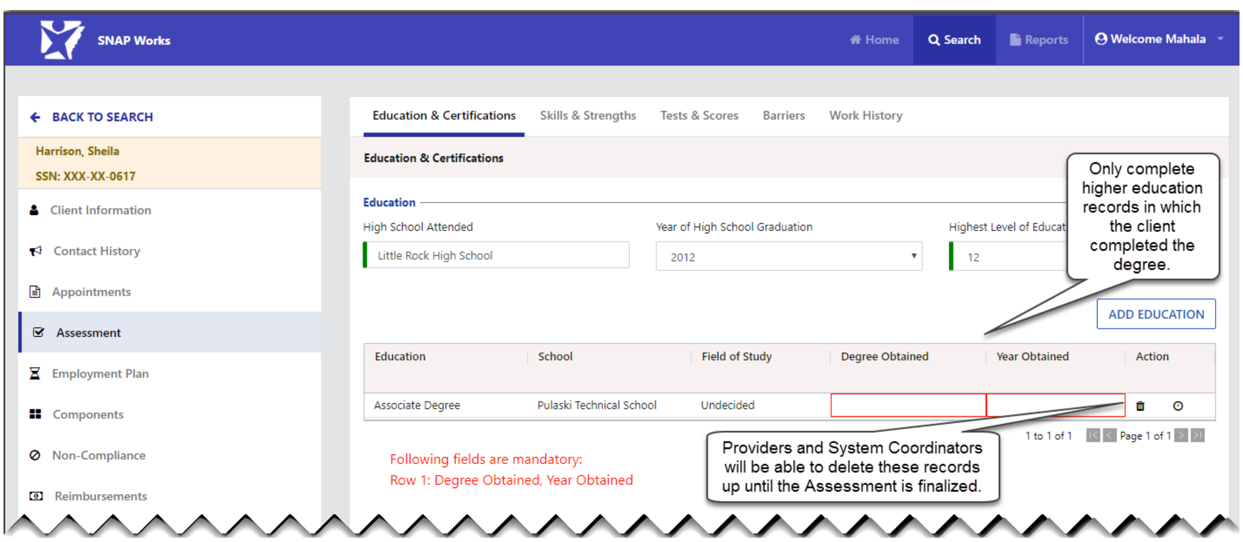
- Federal License
- Professional Certification
- State License
- Technical Certification

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

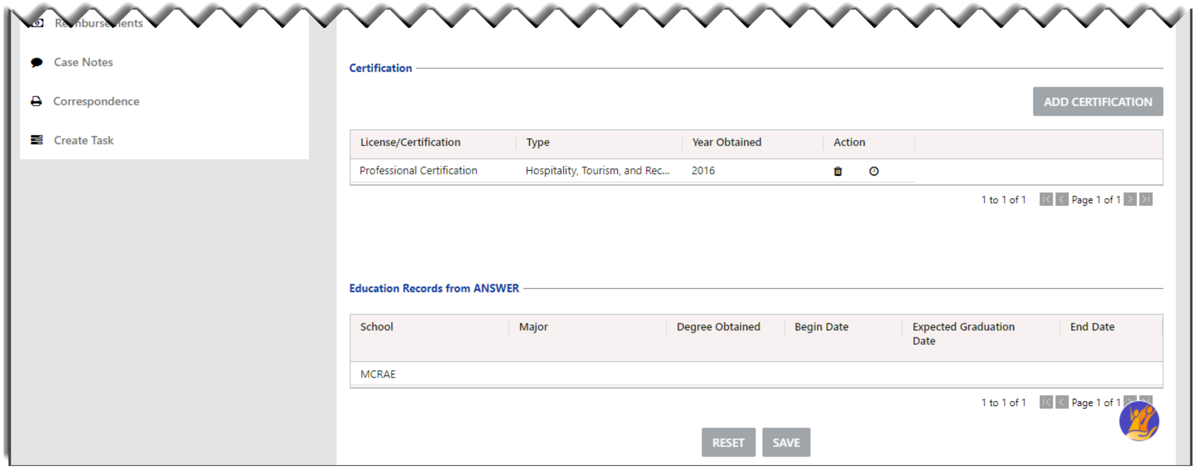
18.2 Screenshot

Below are screenshots of the Education & Certifications page.

This example displays the Education section of the page.



In this example, the Certifications and ***ANSWER*** sections are shown.



18.3 Controls

The following table details the controls that are present on the Education & Certifications Page. Each control includes a description and control type.

Controls	Description	Control Type
Education section		
High School Attended	Text box. Allows the user to enter the name of the last High School the client attended. Required	Always enabled
Year of High School Graduation	Dropdown list. Allows the user to enter the year that the client graduated high school. Required ***NOTE***: In the event that the client has received a GED or did not graduate high school, enter the last year the client attended	Always enabled
Highest Level of Education Obtained	Dropdown list. Allows the user to enter the highest level of education that the Client has obtained. ***NOTE****: If the client did not finish a High School Year or a Higher Education degree, enter the highest level that was completed.*	Always enabled
Add Education	Button. When selected, adds an editable Education record to the Higher Education grid	Always enabled
Higher Education Grid	Table that displays a list of all Higher Education records associated to the client	Display only
Education	Dropdown list. Allows the user to be able to select higher education degrees that the client has received. Required	Always enabled
School	Text box. Allows the user to enter the name of the Higher Education Institution from which the client received their education. Required	Always enabled
Field of Study	Text box. Allows the user to enter the Major or Field of Study that the client was focusing on. Required	Always enabled
Degree Obtained	Text box. Allows the user to enter the type of degree that was obtained. Required	Always enabled

	Example: Bachelor of Science	
Year Obtained	Text Box. Allows the user to enter the date that the Higher Education Degree was received. Format: ***YYYY*** Required	Always enabled
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Certification section		
Add Certification	Button. When selected, adds an editable Certification record to the Certification grid	N/A
Certification Grid	Grid that displays a list of all of the Certificates and Licenses that the client has	Display only
License/ Certification	Dropdown list. Allows the user to select the License or Certification Type. Required	Always enabled
Type	Dropdown list. Allows the user to more clearly define the License or Certification that the client has. This field will only be enabled and required for the following License and Certification Types: • Federal License • Professional Certification • State License • Technical Certification	Conditionally enabled
Year Obtained	Text Box. Allows the user to enter the date that the Certification or License was received Format: ***YYYY*** Required	Always enabled
Action (Delete)	**Trash Can**  icon that Provider or System Coordinator to delete a Certification record. Once the Assessment has been finalized, the user will no longer be able to delete the record	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Education Records from ***ANSWER*** section		
ANSWER Education Grid	Displays all education records related to the Client from the ***ANSWER*** application, if records are available	Display only
School	Displays the name of the schools that the client has attended	Display only
Major	Displays Major the client was seeking for each Education record, if available	Display only

Degree Obtained	Displays the Degree Obtained from the school, if available	Display only
Begin Date	Displays the Date that the client started attending the School, if available	Display only
Expected Graduation Date	Displays the Expected Graduation Date from the school, if available	Display only
End Date	Displays the date the client stopped attending the School, if available	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records available from the ***ANSWER*** Education records	Conditionally enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Education & Certification record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

New Feature: Education and Certifications recorded in previous assessments will automatically display in all future assessments.

Note: If previously entered Education and Certifications are deleted from the assessment, they will not display in future assessments.

18.4 User Actions

The following table details the actions that the user can take on the Education & Certifications Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Education & Certifications page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment.
Completing High School Education	Select the High School Attended, the Year of High School Graduation and the Highest Level Obtained ***NOTE:*** If the client has not completed high school, enter the last year that the client was enrolled in school

Adding Higher Education records	Click the **Add Education** button. A record will be added to the Education grid. Enter or select data directly on the grid: • Education • School • Field of Study • Degree • Year Obtained ***NOTE:*** To add more than one Education record, continue to click the **Add New** button and complete each record.

Adding Certification records	Click the **Add Certification** button.
	A record will be added to the Certification grid. Enter or select data directly on the grid:
	• License/Certification
	• **Type (When the License/Certification selected is any of the following):
	    o Federal License
	    o Professional Certificate
	    o State License
	    o Technical Certificate
	• Year Obtained
	
	NOTE: To add more than one Education record, continue to click the **Add New** button and complete each record.

Deleting a Higher Education record	To delete a record, click the **Trash Can** icon in the record. The record will no longer display on the education grid. ***NOTE:*** Once an assessment has been finalized, education records cannot be deleted.
Deleting a Certification record	To delete a record, click the **Trash Can** icon in the record. The record will no longer display on the certification grid. ***NOTE:*** Once an assessment has been finalized, certification records cannot be deleted.
Navigating to the Education Audit record	Click the **Clock** icon. The user will be taken to the Education Audit record
Navigating to the Certification Audit record	Click the **Clock** icon. The user will be taken to the Certification Audit record

19 Assessment – Skills & Strengths Page

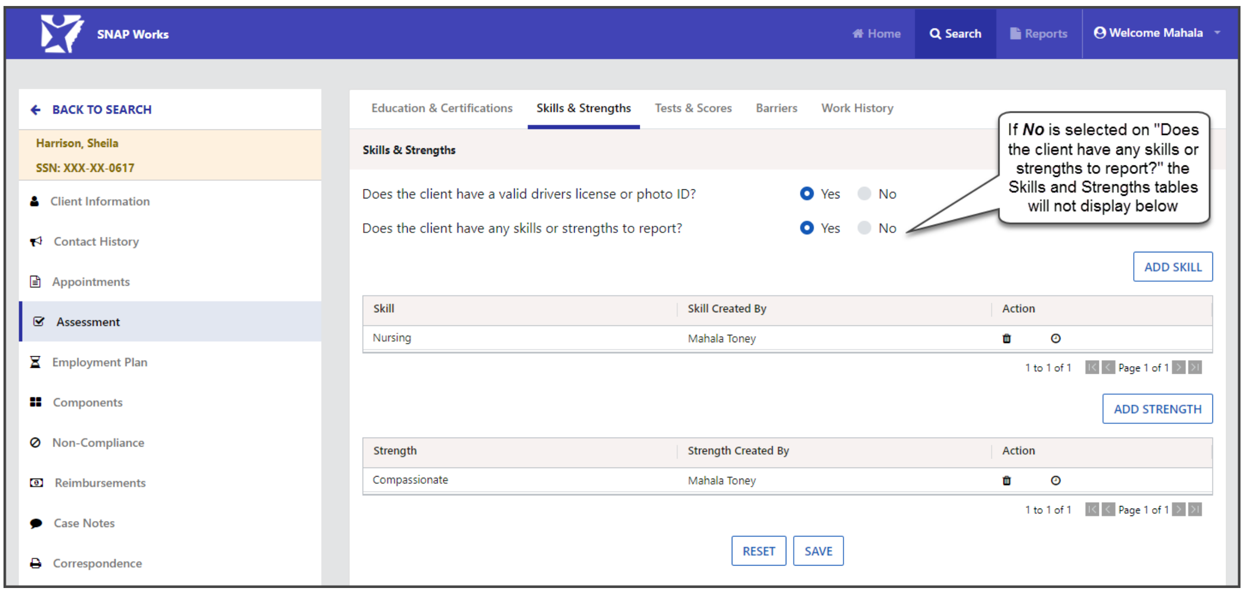
19.1 Overview

The Skills & Strengths page captures the skills and strengths that the client has.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

19.2 Screenshot

Below is a screenshot of the Skills & Strengths page.



19.3 Controls

The following table details the controls that are present on the Skills & Strengths Page. Each control includes a description and control type.

Controls	Description	Control Type
Does the client have a valid driver's license or photo ID?	Radio buttons. Allows the user to select YES or NO	Always enabled
Does the client have any kills or strengths to report?	Radio buttons. Allows the user to enter Strengths and Skills associated to the client. When the user selects ***Yes***, the **Add Skill** button, **Skill** grid, **Add Strength** button, and **Strength** grid will display	Always enabled
Add Skill	Button. Allows the user to be able to add a Skill to the Skill grid	N/A

Skill Grid	Grid allows the user to add and view all of the Skills that are associated to the client	Display only
Skill	Dropdown list. Allows the user to select a skill and associate it to the client. Required	Always enabled
Skill Created By	Text box. Displays the name of the person who created the Skill record	Display only
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Add Strength	Button. Allows the user to be able to add a Strength to the Strength grid	N/A
Pagination Control	Allows the user to see additional records, when there are more than 10 Skill records	N/A
Strength Grid	Grid allows the user to add and view all of the Strengths that are associated to the client	Display only
Strength	Dropdown list. Allows the user to select a strength and associate it to the client. Required	Always enabled
Strength Created By	Text box. Displays the name of the person who created the Strength record	Display only
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to see additional records, when there are more than 10 Strength records	N/A
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Skills & Certifications record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

19.4 User Actions

The following table details the actions that the user can take on the Skills & Strengths Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Skills & Certifications page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open*

	assessment. Click the **Skills & Strengths** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Skills & Strengths** tab in the top navigation menu.

20 Assessment – Tests & Scores Page

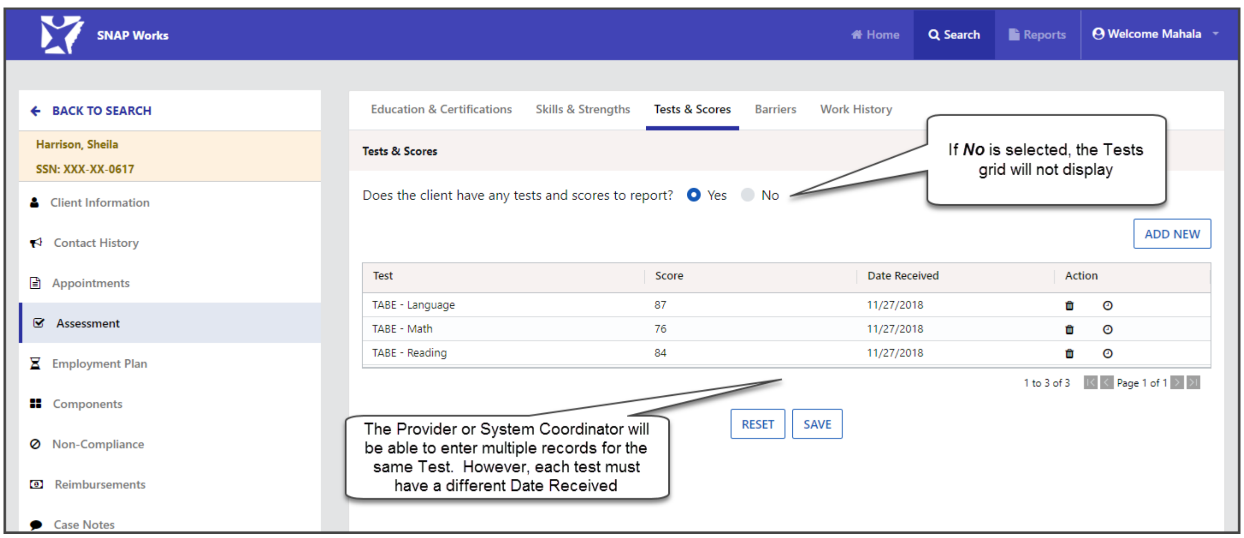
20.1 Overview

The Tests & Scores page captures the scores that the client has received for the various tests they have taken. The user can have multiple scores for the same test; however, if the user attempts to enter a score for the same test on the same date, the user will receive a warning and will not be allowed to save the record.

Providers and System Coordinators will be able to create these records. All other users will only be allowed to view the data.

20.2 Screenshot

Below is a screenshot of the Tests & Scores page.



20.3 Controls

The following table details the controls that are present on the Tests & Scores Page. Each control includes a description and control type.

Controls	Description	Control Type
Add New	Button. Allows the user to be able to add a Test and its Score to the Test grid	N/A
Test Grid	Table allows the user to capture all of the Tests that the client has taken	Display only
Test	Dropdown list. Allows the user to select a test and associate it to the client. Required	Always enabled
Score	Text box. Allows the user to enter a score for the selected test. Format: **###**	Always enabled

Date Received	Date Picker text box. Allows the user to enter a past or current date that the test scores were received ***NOTE:*** The system will allow multiple records for the same Test. However, the user will receive a notification if they attempt to enter the same test for the same date received, to assist in preventing duplicate records.	Always enabled
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Tests & Scores record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

New Feature: All Test Scores recorded in previous assessments will automatically display in all future assessments.

Note: If previously entered Test Scores are deleted from the assessment, they will not display in future assessments.

20.4 User Actions

The following table details the actions that the user can take on the Tests & Scores Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Tests & Scores page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Tests & Scores** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Tests & Scores** tab in the top navigation menu.
Creating a record	Click the **Add New** button. A record will be added to the Test grid allowing the user to enter the record information. Select the appropriate test and enter the score. The Date Received will default to the current date. The user can select or enter a past date as needed.

	Click the **Save** button to save the record. ***NOTE***: The Date Received must be a date between the Referral Date and the current date
Editing a record	In the Test grid, click the field that needs editing and then click **Save**.
Adding more than one record	Once the user enters the data in the Test grid, click the **Add New** button and continue entering the data until all tests have been recorded. The user is not required to save between adding each test, but will need to save once the final test has been entered.

21 Assessment – Barriers Page

21.1 Overview

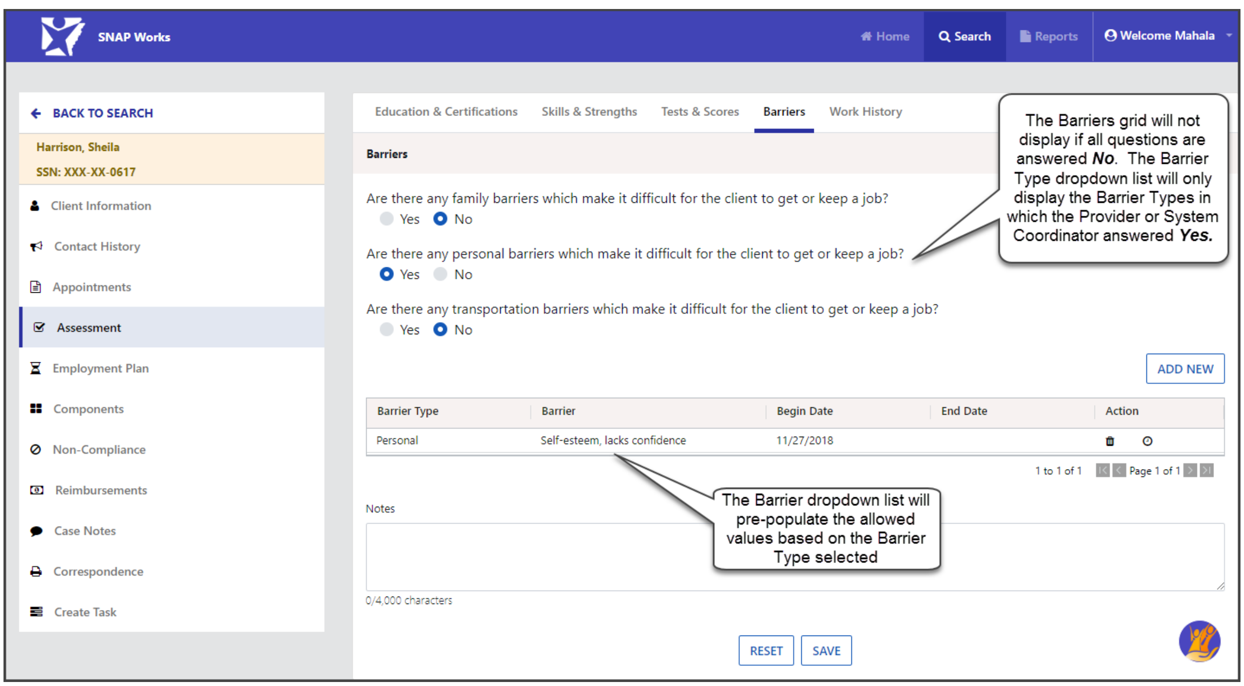
The Barriers page captures any barriers that prevent the client from being self-sufficient. The system categorizes the barriers as follows:

- Family
- Personal
- Transportation

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

21.2 Screenshot

Below is a screenshot of the Barriers page



21.3 Controls

The following table details the controls that are present on the Barriers Page. Each control includes a description and control type.

Controls	Description	Control Type
Are there any family barriers which make it difficult for the	Radio buttons. Required	Always enabled

client to get or keep a job?		
Are there any personal barriers which make it difficult for the client to get or keep a job?	Radio buttons. Required	Always enabled
Are there any transportation barriers which make it difficult for the client to get or keep a job?	Radio buttons. Required	Always enabled
Add New	Button. Allows the user to be able to barriers to the client record.	N/A
Barriers Grid	Grid allows the user to capture all of the Barriers that the client has	Display only
Barrier Type	Dropdown list. Allows the user to select a barrier type and associate it to the client. Required ***NOTE:*** The dropdown list will only display the barrier types in which the user has answered ***Yes*** in the previous questions	Always enabled
Barrier	Dropdown list. Based on the selected Barrier Type, the user will be able to categorize and associate the barriers that need to be overcome by the client	Always enabled
Begin Date	Date Picker text box. Allows the user to manually enter or select a past, current, or future date of the barrier. Format: ***mm/dd/yyyy*** Required	Always enabled
End Date	Date Picker text box. Allows the user to enter or select the date that the barrier is no longer active Format: ***mm/dd/yyyy*** ***NOTE:*** If a Barrier End Date is entered, it must be greater than or equal to the Barrier Begin Date	Always enabled
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Barriers record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists,	N/A

	toast notifications will display to notify the user of the missing or invalid information.

21.4 User Actions

The following table details the actions that the user can take on the Barriers Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Barriers page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Barriers** tab in the top navigation menu. Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Barriers** tab in the top navigation menu.
Creating a Barrier	All questions must be answered. When ***Yes*** is selected for a question, a Barriers grid will display. Click the **Add New** button and enter data directly into the grid. The Barrier can have a past, current or future start date. The end date will only be used to document when the client overcame the barrier. Notes can be added, if desired. Click the **Save** button to save the record. ***NOTE***: The Barrier Type dropdown list will only display the barrier types in which the user selected ***Yes***. Each Barrier Type will have a different list of barriers associated to the type.
Editing a record	In the Barrier grid, click the field that needs editing, making the necessary edit, and then click **Save**.
Adding more than one record	Once the user enters the data in the Barrier grid, click the **Add New** button and continue entering the data until all barriers have been recorded. The user is not required to save between adding each record, but will need to save once the final record has been entered. ***NOTE***: The user may need to adjust the answers on the Barriers questions. When a barrier has changed from ***Yes*** to ***No,*** any barriers that were added will be removed. Once the user saves the change, the record(s) associated to the barrier type will no longer be accessible. Click the **Reset** button if the change was made in error.

22 Assessment – Work History Page

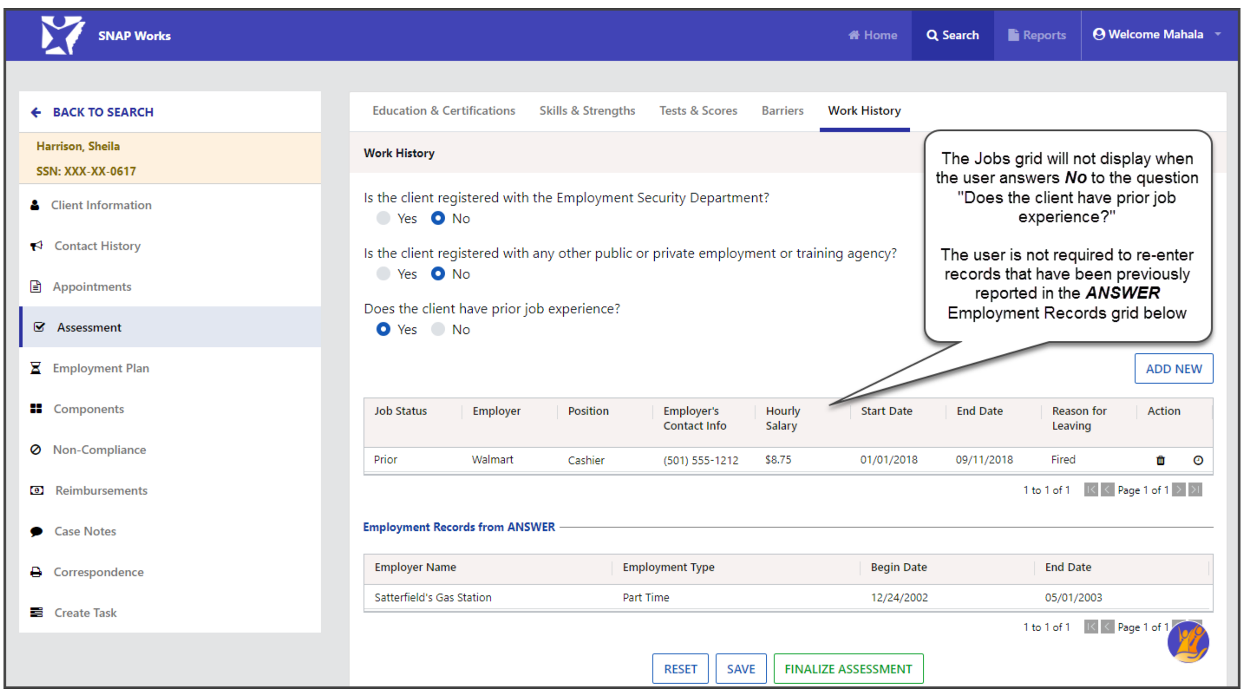
22.1 Overview

The Work History page will allow the user to enter any prior job experience and to enter new employment that may not be in the ***ANSWER*** application. The Employment records that were recorded in ***ANSWER*** will display for the benefit of the user.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

22.2 Screenshot

Below is a screenshot of the Work History page.



22.3 Controls

The following table details the controls that are present on the Work History Page. Each control includes a description and control type.

Controls	Description	Control Type
Is the client registered with the Employment Security Department?	Radio buttons. Required	Always enabled

Is the client registered with any other public or private employment or training agency?	Radio buttons. Required	Always enabled
Does the client have prior job experience?	Radio buttons. When ***Yes*** is selected, the Add New button and Jobs grid will display. Required	Always enabled
Add New	Button. Allows the user to be able to employment records to the client record that do not exist in the ***ANSWER*** application.	N/A
Jobs Grid	Grid allows the user to capture all of the Employment that the client has had, that are not available in the ***ANSWER*** application	Display only
Job Status	Dropdown list. Allows the user to enter current or previous employment history. Required	Always enabled
Employer	Text box. Allows the user to be able to enter the name of the employer for the record. Required	Always enabled
Position	Text box. Allows the user to enter the type of position for the employment record. Required	Always enabled
Employer's Contact Info	Text box. Allows the user to be able to enter contact information for the employment record. Required	Always enabled
Hourly Salary	Text box. Allows the user to be able to enter the hourly salary for the employment record. Format: ***$##.##*** Required	Always enabled
Start Date	Date picker text box. Allows the user to select or manually enter the date that the client began working at the selected employer. Format: ***mm/dd/yyyy*** Required.	Always enabled
End Date	Date picker text box. Allows the user to select or manually enter the date that the client stopped working at the selected employer. Format: ***mm/dd/yyyy*** ***NOTE:*** Required when Job Status = ***Prior***	Conditionally enabled
Reason for Leaving	Dropdown list. Allows the user to select the reason why the client is no longer working for the selected employer. ***NOTE:*** Required when Job Status = ***Prior***	Conditionally enabled
	Delete button, identified as a "trash can"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

ANSWER Employment Records Grid	Grid displays all of the employment records that are available in the ***ANSWER*** application for the client	Display only
Employer Name	Displays the Employer Name of the select Employment record	Display only
Employment Type	Displays the type of employment that the client had with the employer, if available	Display only
Begin Date	Displays the date that the client started work with the select Employer, if available	Display only
End Date	Displays the date that the client stopped working for the select Employer, if available	Display only
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Work History record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A
Finalize Assessment	Button. Validates that all sections of the Assessment have been completed. If all sections have been successfully completed, the Assessment becomes locked, and is no longer editable. ***NOTE:*** The status of the Assessment will change from ***In Progress*** to ***Completed***	N/A

22.4 User Actions

The following table details the actions that the user can take on the Work History Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Work History page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Work History** tab in the top navigation menu. Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Assessment** hyperlink in the left navigation menu. Click *Add New* or select an existing *Open* assessment. Click the **Work History** tab in the top navigation menu.
Creating an Employment Record	To access the Work History grid, "Does the client have prior work experience?" must have ***Yes*** selected. The **Add New** button and the Employment grid will display. Click the **Add New** button to begin entering the data in the Employment grid.

	If Job Status = ***Current***, the following fields are required to save the record: • Job Status • Employer • Position • Employers Contact Info • Hourly Salary • Start Date If Job Status = ***Prior***, the following fields are required to save the record: • Job Status • Employer • Position • Employers Contact Info • Hourly Salary • Start Date • End Date • Reason for Leaving Click the **Save** button to save the record.
Editing a record	The user will be allowed to edit a ***Current*** employer to change the status to ***Prior*****.** Once this change has been made, the End Date and Reason for Leaving will be required. ***NOTE:*** If the client returns to an employer that has a ***Prior*** employment record listed, the user must create a new record to preserve the prior record's information. The system will allow multiple current employers, as long as there are not two employers with the same name in current status.
Creating multiple employment records	Once the first record has been created, click the **Add New** button to add another row to the Employment grid and continue to complete the data in the new record. ***Note:*** It is not necessary to save between each record, but the user will need to save once the final record has been added.
Finalizing the Assessment	Once data has been entered, and saved on all tabs within the Assessment, click the **Finalize Assessment** button. The system will check to ensure all forms have been successfully updated and notify the user of any issues that need to be corrected. If all records are successfully saved, the system will close and lock the assessment. The status of the Assessment will be updated to indicate that the Assessment is Completed. The Assessment will no longer be editable and cannot be deleted.

23 Employment Plan Summary Page

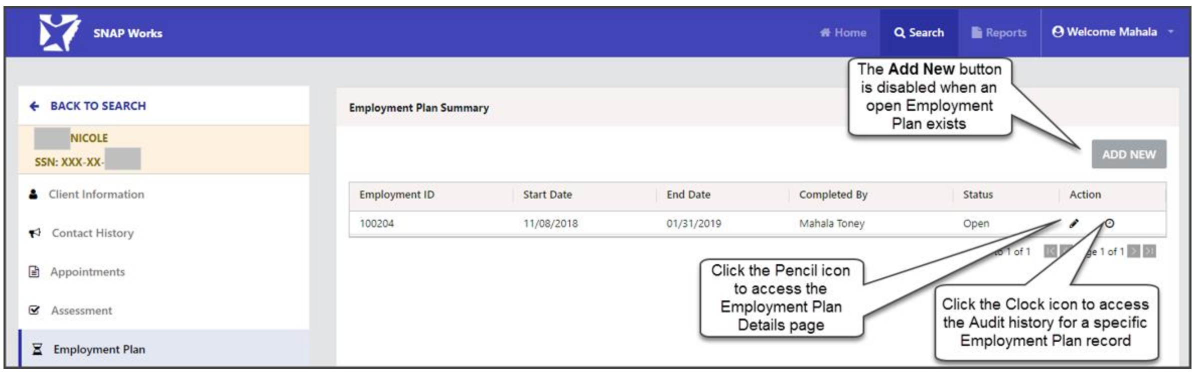
23.1 Overview

The Employment Plan Summary will display a list of all of the Employment Plans that are associated to the client record.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

23.2 Screenshot

Below is a screenshot of the Employment Plan Summary page.



23.3 Controls

The following table details the controls that are present on the Employment Plan Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Add New	Button. Allows the user to be able to create an Employment Plan on the client. The **Add New** button will be disabled if there is an *Open* Employment Plan or if an Assessment has not been conducted	Conditionally enabled
Employment Plan Summary Grid	Grid that displays a list of all of the Employment Plans associated to the client	Display only
Employment ID	Displays the identification number of the Employment Plan. The Employment ID is used to associate the Components to the correct Employment Plan	Display only
Start Date	Displays the date that the Employment Plan was initiated	Display only

End Date	Displays the Estimated Completion Date of the Employment Plan	Display only
Completed By	Displays the name of the user who created or last updated the Employment Plan	Display only
Status	Displays the current status of the Employment Plan	Display only
	Edit button, identified as a "pencil" ***NOTE:*** The System Coordinator is the only user role that can edit a closed Employment Plan	Always enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

23.4 User Actions

The following table details the actions that the user can take on the Employment Plan Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Employment Plan Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Employment Plan** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Employment Plan** hyperlink in the left navigation menu.
Creating a new Employment Plan	Click the **Add New** button to access the Employment Plan Details page. ***Note:*** The **Add New** button will be disabled if there has not been an Assessment completed, or if there is an *Open* Employment Plan.
Editing an existing Employment Plan	Click the **Pencil**  icon to access the Employment Plan Detail page for the selected Employment Plan.

24 Employment Plan Details Page

24.1 Overview

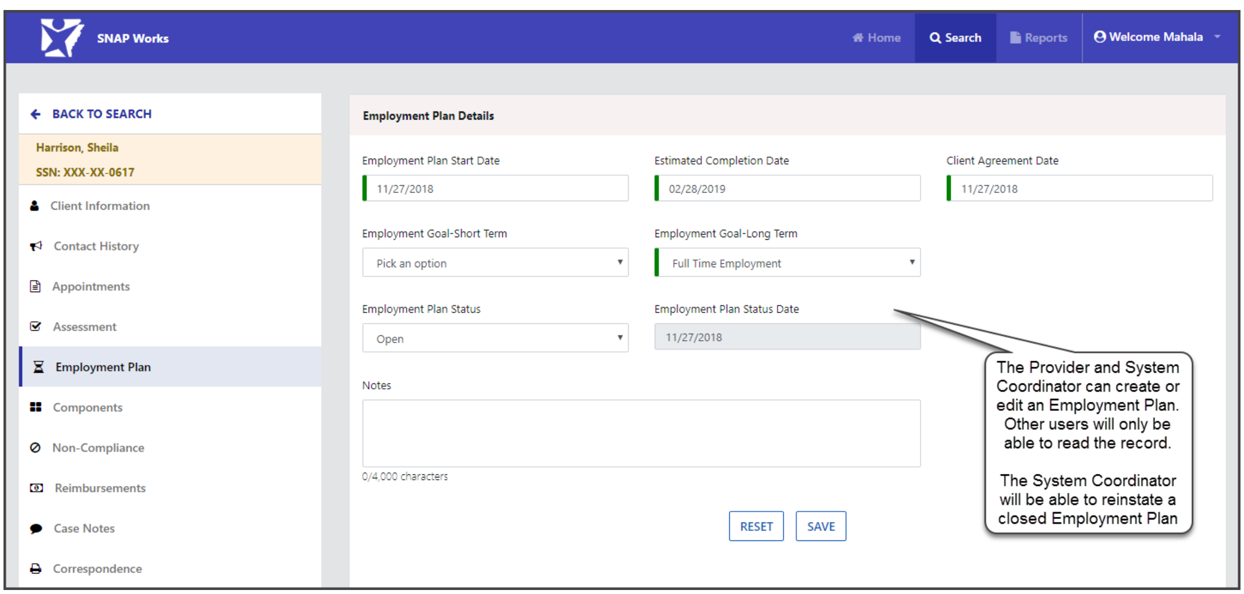
The Employment Plan Details page captures the details related to the Employment Plan, such as the date the client signed the agreement and the goals for the client.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

> **TIP:** If the Provider closed the Employment Plan in error, the user will need to contact the System Coordinator to reinstate the Employment Plan.

24.2 Screenshot

Below is a screenshot of the Employment Plan Details page.



24.3 Controls

The following table details the controls that are present on the Employment Plan Details Page. Each control includes a description and control type.

Controls	Description	Control Type
Employment Plan Start Date	Date picker text box. Allows the user to be able to enter the date that the Employment Plan starts. Format: ***mm/dd/yyyy*** Required	Conditionally enabled

	Once the record is saved, the field is no longer editable. ***NOTE:*** Allows a past or current date. Date cannot be prior to the Assessment Date.	
Estimated Completion Date	Date picker text box. Allows the user to enter a current or future date. Format: ***mm/dd/yyyy*** Required ***NOTE:*** Date cannot be prior to the Employment Plan Start Date The Estimated Completion Date can be updated by the Provider or System Coordinator to extend or shorten the date. The date cannot be shorted to a date prior to the current date.	Always enabled
Client Agreement Date	Date picker text box. Allows the user to enter or select the date that the Client agreed to the Employment Plan. Cannot be a date prior to the Employment Plan Start Date Format: ***mm/dd/yyyy*** Required. Once the record is saved, the field is no longer editable.	Conditionally enabled
Employment Goal – Short Term	Dropdown list. Allows the user to select a short term goal for the client's Employment Plan. Once the record is saved, the field is no longer editable.	Conditionally enabled
Employment Goal – Long Term	Dropdown list. Allows the user to select a long term goal for the client's Employment Plan. Once the record is saved, the field is no longer editable. Required.	Conditionally enabled
Employment Plan Status	Dropdown list. Allows the user to enter or update the status of the Employment Plan. Defaults to ***Open*** when the user is creating a new record. ***NOTE:*** When the Provider or System Coordinator changes the status of the Employment Plan, the Closure Reason field is required. The user will need to also close client record on the *Enrollment Summary* page when the client will no longer be participating in the ***SNAP Works*** Program	Always enabled
Employment Plan Status Date	Text box. Displays the date that Employment Plan Status has been updated.	Display only
Closure Reason	Dropdown list. The Provider or System Coordinator will be able to select the reason the Employment Plan was closed. Required ***NOTE***: This field does not display on the form until the Employment Plan Status has been changed to ***Closed***	Conditionally enabled

Notes	Text box. Allows the user to be able to enter any comments regarding the Employment Plan Details page.	Always enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Employment Plans Detail record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

24.4 User Actions

The following table details the actions that the user can take on the Employment Plan Details Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Employment Plan Details page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Employment Plan** hyperlink in the left navigation menu. Click the **Add New** button or the icon. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Employment Plan** hyperlink in the left navigation menu. Click the **Add New** button or the icon.
Creating an Employment Plan	Click the **Add New** button to access a blank Employment Plan Details. The following fields are required to save the record: • Employment Plan Start Date • Estimated Completion Date • Client Agreement Date • Employment Goal – Long Term The user may add a Short Term Goal or Notes. The system will default the status to *Open.* Click the **Save** button to save the record.
Changing the Estimated Completion Date	The user will be able to shorten or lengthen the Estimated Completion Date. The user cannot short the date to prior to the current date.
Closing an Employment Plan	Access the open Employment Plan and change the Employment Plan Status to ***Closed***. A Closure Reason must be selected to save the record. The following closure reasons will allow the user to be able to create another Employment Plan: • Successfully Completed • Updated Employment Plan • Subsidized Employment • Unsubsidized Employment

NOTE**:** All other Closure Reasons will require the user to access the Enrollment Summary page, found in the Client Information section, to close the case.

25 Components – Component Summary Page

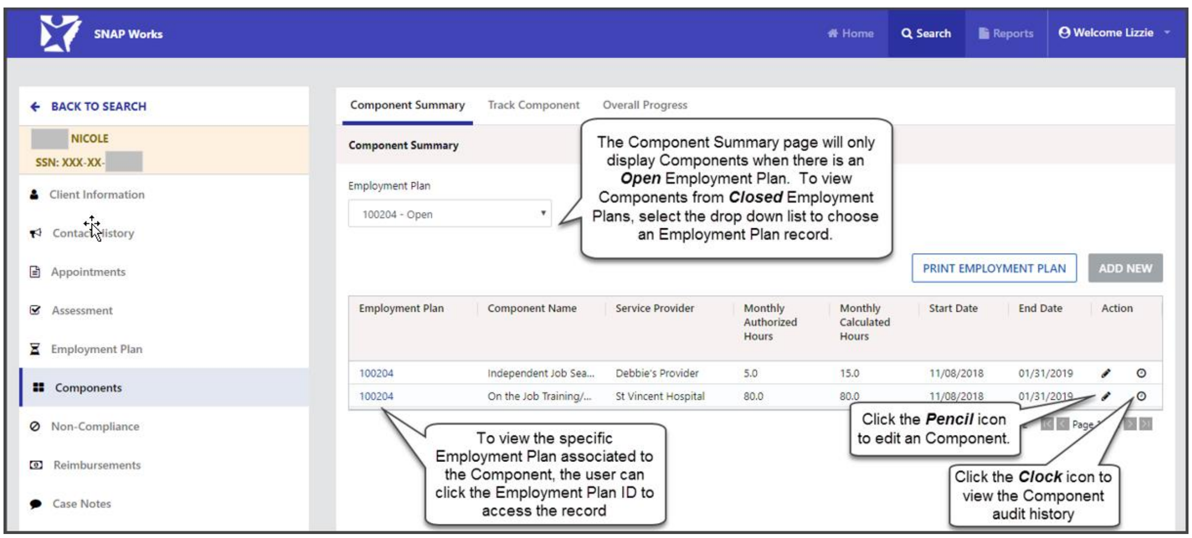
25.1 Overview

The Component Summary page will display all of the Components that have been assigned to the client. Only Components from *Open* Employment Plans will display on the page. To view Components on *Closed* Employment Plans, select a

The Provider and System Coordinator will be able to create these records; all other users will have read access only. Employment Plan ID from the Employment Plan dropdown list.

25.2 Screenshot

Below is a screenshot of the Component Summary page.



25.3 Controls

The following table details the controls that are present on the Component Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Employment Plan	Dropdown list. Allows the user to view Component records for closed Employment Plans. Defaults to the *Open* Employment Plan	Always enabled
Print Employment Plan	Button. Allows the user to access the Correspondence page to print the Employment Plan for the client	N/A
Add New	Button. Allows the user to create a new Component record on the Client.	N/A

	NOTE: This button is disabled if there is not an open Employment Plan	
Component Grid	Grid that displays all of the Components that are related to an Employment Plan	Display only
Employment Plan	Hyperlink. Allows the user to access the specific Employment Plan that is associated to the Component	Always enabled
Component Name	Displays the name of the Component that the client is assigned to	Display only
Service Provider	Displays the name of the Service Provider that is working with the client on the Component. ***NOTE:*** The Service Provider may be the assigned provider, another provider associated with the Department of Human Services, or a Third Party Provider that is not associated with the Department of Human Services	Display only
Monthly Authorized Hours	Displays the number of authorized hours that the client is supposed to complete during a given month	Display only
Monthly Calculated Hours	Displays the number of calculated hours that is actually needed to complete a component during a given month ***NOTE:*** Refer to Appendix C – Requirement to Work Counting Formula for more details related to how the calculations are determined.	Display only
Start Date	Displays the date that the client is required to start completing the Component	Display only
End Date	Displays the Estimated Completion Date for the Component	Display only
	Edit button, identified as a "pencil"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

25.4 User Actions

The following table details the actions that the user can take on the Component Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Component Summary page, the user can access the client record by any of the following methods:

	• Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Components** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Components** hyperlink in the left navigation menu.
Creating a Component	Click the **Add New** button to access the Component Detail page.
Editing an Existing Component	Click the **Pencil** icon on a specific component record located in the Component grid to access an editable version of the Component Detail page
Creating multiple Components	After the initial component record is created, click the **Add New** button to access another blank Component Detail page to create another component. Repeat these steps until all needed components have been created.
Printing the Employment Plan	Once all of the Components have been created click the **Print Employment Plan** button. The user will be taken to the Correspondence page. Select the record on the Correspondence grid and print the record.

26 Component – Component Details Page

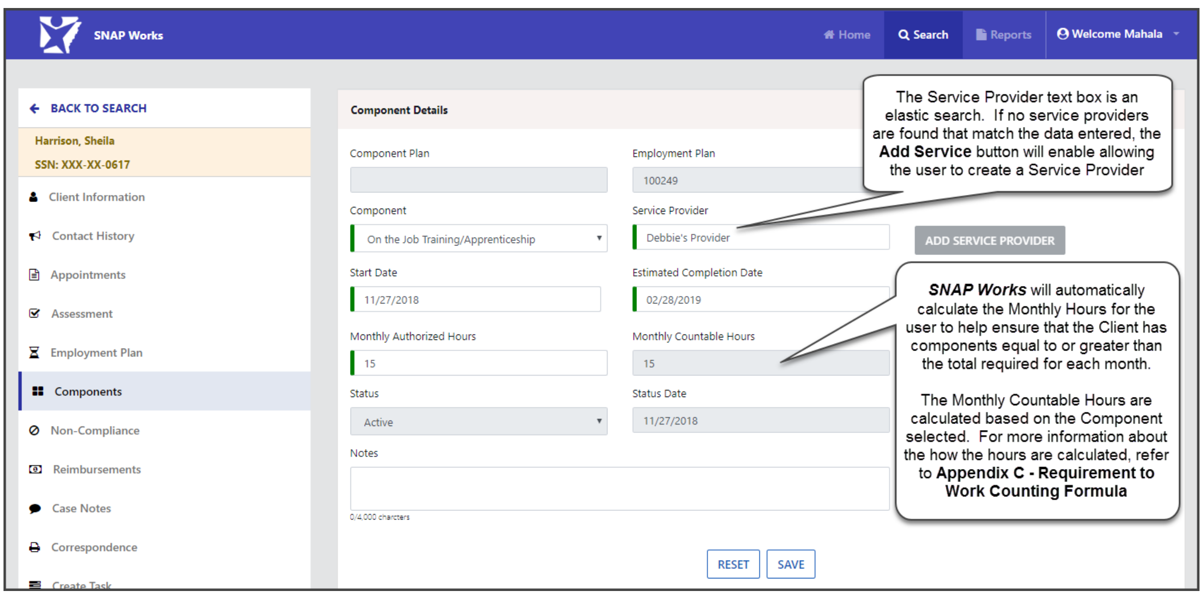
26.1 Overview

The Component Details page captures information related to the component that has been assigned to the client. The user will enter the Component, date range to complete the component, number of monthly hours to complete, and the Service Provider assigned to the Component.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

26.2 Screenshot

Below are screenshots of the Component Detail and Add New Service Provider pages.



26.3 Controls

The following table details the controls that are present on the Component Details Page. Each control includes a description and control type.

Controls	Description	Control Type
Component Plan	Displays the Component ID number for the component record	Display only
Employment Plan	Displays the Employment Plan ID that is associated to the component record	Display only
Component	Dropdown list. Allows the user to select the component that the Client will be completing. Required	Always enabled

	NOTE: Rules are in place to notify the user of the following conditions and will display as a yellow warning message in the upper right corner of the page: • Exceeding the number of allowed hours for a component or a group of components within a month • Required conjunction components • How authorized hours are calculated ○ Refer to Appendix C – Requirement to Work Counting Formula for details • The component *Job Retention* Start and Estimated Completion Dates cannot exceed 90 days	
Service Provider	Elastic Search. Allows the user to select an existing Provider or Third Party Provider. When the user searches for a Third Party Provider and the search does not return any results, the **Add Service Provider** button will enable to allow the user to create the provider. Required	Always enabled
Add Service Provider	Button. A search for the Service Provider must be completed before the **Add Service Provider** button will enable. Selecting the **Add Service Provider** button will send the user to the Add Service Provider page	N/A
Start Date	Date picker text box. Allows the user to enter a Start Date for the component. Format: ***mm/dd/yyyy*** Required ***NOTE:*** The Start Date cannot be prior to the Employment Plan Start Date	Always enabled
Estimated Completion Date	Date picker text box. Allows the user to enter an estimated date of completion for the component. Format: ***mm/dd/yyyy*** Required ***NOTE:*** The Estimated Completion Date cannot be prior to the Start Date	Always enabled
Monthly Authorized Hours	Text box. Allows the user to enter the number of authorized hours for the component. Format: ***##.#*** Required ***NOTE:*** For specifics on the maximum number of allowed hours, refer to Appendix C – Requirement to Work Counting Formula for specifics related to each component	Always enabled
Monthly Countable Hours	Text box. Displays the number of actual hours that must be completed in a given month for the specific component.	Display only

	NOTE: For specifics on the formula that determines the number of countable hours, refer to Appendix C – Requirement to Work Counting Formula for details	
Status	Dropdown list. Allows the user to update the status of the component. When creating a component, the value will default to ***Active***	Always enabled
Status Date	Text box. Displays the date that the Component's status became effective	Display only
Notes	Text box. Allows the user to be able to enter any comments regarding the Component.	Always enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Component Detail record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

26.4 User Actions

The following table details the actions that the user can take on the Component Details Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Component Detail page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Components** hyperlink in the left navigation menu. Click the **Add New** button or icon to access the page. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Components** hyperlink in the left navigation menu. Click the **Add New** button or icon to access the page.
Creating a Component	Select a Component from the Component dropdown list. Complete a search for a service provider. Enter the Star Date and Estimated Completion Date. Assign the number of Monthly Authorized Hours, as well as any Notes that may be needed. Click the **Save** button to save the record. ***NOTE:*** If no service provider is found, matching the data entered, the user can click the **Add Service Provider** button to create a third party service provider. The system will convert the number of Monthly Authorized Hours to Monthly Countable Hours based on the Component selected. For more

	information regarding how the hours are calculated, please refer to Appendix C – Requirement to Work Counting Formula for details.
Closing A Component	Click the **Pencil** icon in the Component Summary page to access the record. Change the status on the Component Details page and click the **Save** button.
Updating a Component	Click the **Pencil** icon in the Component Summary page to access the record. The user will be able to make changes to the following fields: • Component • Service Provider • Start Date • Estimated Completion Date • Monthly Authorized Hours • Notes Click the **Save** button to save the changes.
Creating a Service Provider	When creating or editing a Component, complete a search in the elastic search Service Provider text box. If no records are found that match the data entered, the **Add Service Provider** button will enable allowing the user to create the record. Clicking the **Add Service Provider** button will send the user to the Add Service Provider page. Complete the following fields and click the **Save** button: • Service Provider Name • Contact First Name • Contact Last Name • Service Provider Begin Date • Service Provider End Date (if needed) Once the Service Provider is successfully saved, the user will be sent back to the Component Details page and the Service Provider will be display in the Service Provider text box.

27 Components – Track Component Page

27.1 Overview

The Track Component page is used to complete the number of hours that the client has completed towards their Component goals. The user will also enter the decision if the client has met those goals. If a Good Cause is requested for the client, the system will update the Met Plan value to display the Good Cause Decision.

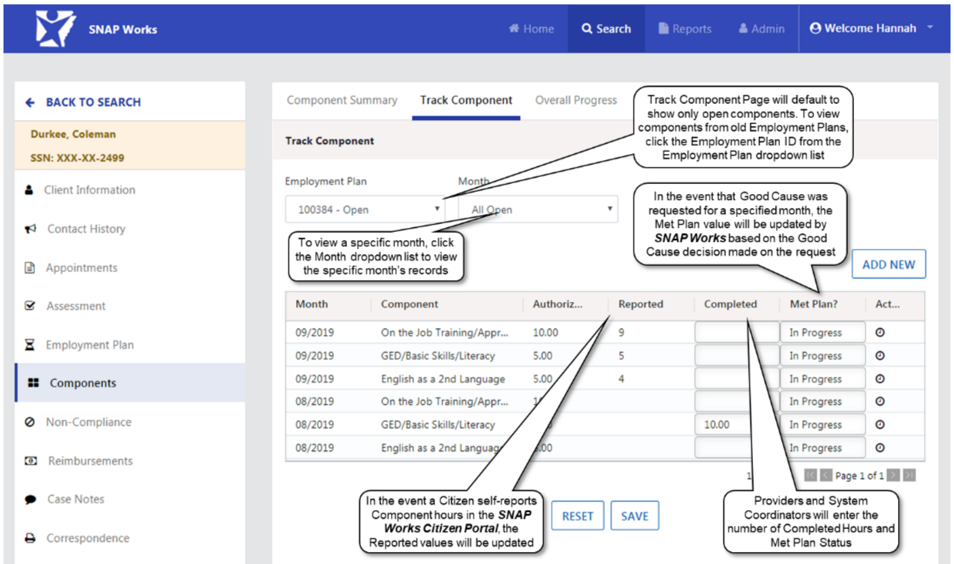
TIP: When the Track Components are ready to be entered for the month, complete ***both*** the Completed and the Met Plan? fields.

Complete any Good Cause requests *after* the Track Components are completed for the month to ensure that the Overall Progress correctly updates once the Good Cause Decision is made.

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

27.2 Screenshot

Below is a screenshot of the Track Components page.



27.3 Controls

The following table details the controls that are present on the Track Component Page. Each control includes a description and control type.

Controls	Description	Control Type
Employment Plan	Dropdown list. Allows the user to view Component records for closed Employment Plans. Defaults to the *Open* Employment Plan	Always enabled
Month	Dropdown list. Always the user to be able all open months or a specific month related to the selected Employment Plan. Defaults to *All Open*	Always enabled
Add New	Button. When selected, the system will add the current month to the Track Component grid, if the month has not previously been added. ***NOTE:*** Multiple months (previous and current) will be created when the Employment Start Date is prior to the current month *and* the previous month(s) had not been previously added to the grid.	N/A
Track Component Grid	Displays a grid of all of the Components for the selected Employment Plan	Display only
Month	Displays the Month and Year for the Track Component record	Display only
Component	Displays the name of the component	Display only
Authorized	Displays the number of Authorized Hours that have been assigned to the component	Display only
Reported	Displays the number of Reported Hours reported by the Citizen in the ***SNAP Works Citizen Portal*** ***New Feature:*** In the event a Citizen self-reports Component hours, in the ***SNAP Works Citizen Portal***, those hours will display as read-only in the Reported column.	Display only
Completed	Text box. Allows the user to enter the number of hours they have verified that the Ctizen has completed for the month. Format: ***#.#*** Required when the user updates the Met Plan? dropdown list. ***NOTE:*** If the client did not complete any hours for a component, enter **0** or **0.0** and select a **Met Plan?** value. Leaving the field without a value will be considered as the data is not available to be entered at the time the user is updating the Track Component record(s).	Always enabled
Met Plan?	Dropdown list. Allows the user to determine if the client has met their obligation for the component. The Met Plan? value will default to ***In Progress***. ***NOTE:*** The Met Plan? dropdown list is not required to save the form	Always enabled

	In the event a Good Cause was requested for the month, the Met Plan? ***No* value** will be overwritten by the system once the Good Cause Decision has been saved to the record. This value is not updatable once the decision has been made. For more information on Good Cause, refer to Section 29 – Non-Compliance Summary and Section 30 – Non-Compliance Details.	
	Audit button, identified as a "clock" that redirects the user to the audit page	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Track Component record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

27.4 User Actions

The following table details the actions that the user can take on the Track Component Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Track Component page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Components** hyperlink in the left navigation menu. Click the **Track Component** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Components** hyperlink in the left navigation menu. Click the **Track Component** tab in the top navigation menu.
Completing a Monthly Track Component	Click the **Add New** button. The Track Component grid will display all of the open Track Components that are available for entering the Completed hours through the current month. Enter the number of hours that the client completed for each component and select a value in the Met Plan? dropdown list. Click the **Save** button to save the changes. ***NOTE:*** If Good Cause is being requested for the client, complete the Non-Compliance BEFORE entering the Track Component record. This will ensure that the Good Cause decision is appropriately applied to the Overall Progress record for the specified month.

Viewing completed Track Component records	The user will be able to select a Closed Employment Plan from the Employment Plan dropdown list and/or select a select month from the Month dropdown list to view older records. The application will update to display any records that meet the criteria selected.

28 Components – Overall Progress Page

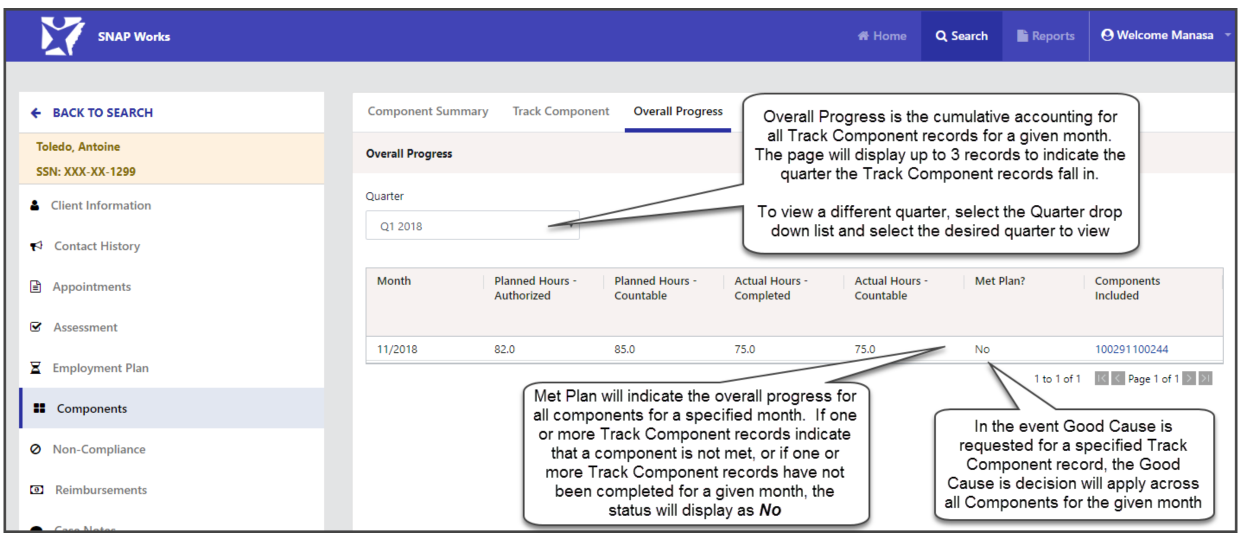
28.1 Overview

The Overall Progress page displays the cumulative progress by month for all components assigned to the client. The user will be able to view the months by Quarter. Selecting a value from the Quarter dropdown list will display the months for the select quarter.

This page is read only for all users.

28.2 Screenshot

Below is a screenshot of the Overall Progress page.



28.3 Controls

The following table details the controls that are present on the Overall Progress Page. Each control includes a description and control type.

Controls	Description	Control Type
Quarter	Dropdown list. Displays a list of Quarters (Quarter YYYY) to allow the user to be able to look at the overall progress for the client over a select 3-month time frame. ***NOTE:*** The quarters are Federal quarters, as follows: • Q1: July – September • Q2: October – December • Q3: January – March • Q4: April – June	Always enabled

Overall Progress Grid	Displays a list of all of the months of progress for a specified quarter. ***NOTE:*** The page will default to the current quarter	Display only
Month	Displays the month and year for an Overall Progress record during the specified quarter	Display only
Planned Hours – Authorized	Displays the total number of Monthly Authorized Hours that are associated to all active components for the specified month	Display only
Planned Hours – Countable	Displays the total number of Monthly Calculated Hours that are associated to all active components for the specified month	Display only
Actual Hours – Completed	Displays the total number of Completed hours from all active components for the specified month	Display only
Actual Hours – Countable	Displays the total number of calculated hours based on the number of completed hours for the specified month	Display only
Met Plan?	Displays the client's overall status for the month for all components. ***NOTE:*** In the event a Good Cause was requested for the month, the Good Cause decision will supersede all other potential statuses. For more information on Good Cause, refer to Section 29 – Non-Compliance Summary and Section 30 – Non-Compliance Details.	Display only
Components Included	Hyperlink(s). Displays the Component IDs that were used to determine the overall month's progress. The user will be able to select a Component ID and navigate to the specific Component Detail page to review as needed	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

28.4 User Actions

The following table details the actions that the user can take on the Overall Progress Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Overall Progress page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Components** hyperlink in the left navigation menu. Click the **Overall Progress** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the

	Components hyperlink in the left navigation menu. Click the **Overall Progress** tab in the top navigation menu.
Accessing a select Component	Click the **Component ID** hyperlink in Overall Progress grid. The user will be able to access the Component Detail record
Viewing older Overall Progress records	Select a value from the Quarter dropdown list. The page will display a list of all Overall Progress records for the selected value.

29 Comparable Workfare

29.1 Overview

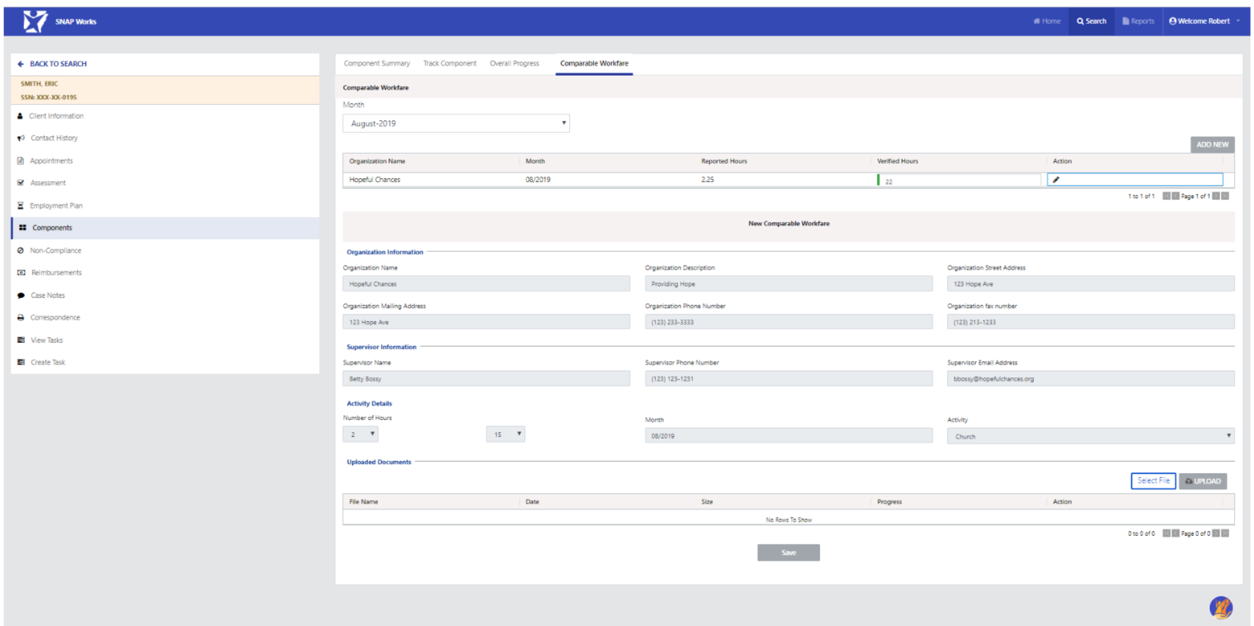
The Comparable Workfare page displays the Citizen's historical Comparable Workfare participation if the Citizen has participated in Comparable Workfare.

This page is read-only for Providers.

New Feature: The Comparable Workfare tab is a brand new page in the Provider Portal Components page.

29.2 Screenshot

Below is a screenshot of the Comparable Workfare page.



29.3 Controls

The following table details the controls that are present on the Comparable Workfare Page. Each control includes a description and control type.

Controls	Description	Control Type
Month	Dropdown list. Displays a list of Months (Month - YYYY) to allow the user to be able to look at the Comparable Workfare records for a selected month.	Always enabled
Comparable Workfare grid	Displays a list of all Comparable Workfare records for the selected month. ***NOTE:*** The page will default to the current month	Display only

Add New	Button. When selected, displays a blank Comparable Workfare record.	
Organization Name	Displays the name of the Organization for which the Citizen performed the Comparable Workfare activity.	Display only
Month	Displays the month in which the Comparable Workfare activity took place.	Display only
Reported Hours	Displays the number of Comparable Workfare hours performed by the Citizen.	Display only
Verified Hours	Displays the number of Comparable Workfare hours the County Worker has confirmed the Citizen performed.	Display only
Action	Displays the pencil icon to view details of the Comparable Workfare record.	Always enabled
Pagination Control	Allows the user to page through the results when there are more than 10 records present.	Conditionally enabled
New Comparable Workfare grid	Displays the information of the Comparable Workfare record when the pencil icon or the Add New button is selected	Conditionally enabled
Activity Details grid	Displays the information of an activity in which a citizen has participated in an Organization.	Conditionally enabled
Number of hours	Displays the number of hours a citizen has participated in an activity in an Organization.	Conditionally enabled
Month	Displays the month and year of the participation by a citizen in an activity in an Organization.	Conditionally enabled
Activity	Displays the name of an activity participated by a Citizen in an Organization.	Conditionally enabled
Organization Information grid	Displays the details of the Organization for which the citizen performed the Comparable Workfare activity.	Conditionally enabled
Organization Name	Displays the name of the Organization for which the Citizen performed Comparable Workfare.	Conditionally enabled
Organization Description	Displays the description of the Organization for which the Citizen performed Comparable Workfare with. For example: Hospital, Food Bank, etc.	Conditionally enabled
Organization Street Address	Displays the street address of the Organization for which the Citizen performed Comparable Workfare.	Conditionally enabled
Organization Mailing address	Displays the mailing address of the Organization for which the Citizen performed Comparable Workfare.	Conditionally enabled
Organization phone number	Displays the phone number of the Organization for which the Citizen performed Comparable Workfare.	Conditionally enabled
Organization fax number	Displays the fax number of the Organization for which the Citizen performed Comparable Workfare.	Conditionally enabled
Supervisor Information grid	Displays the information of the supervisor who oversees the client's Comparable Workfare in the Organization.	Conditionally enabled
Supervisor Name	Displays the name of the supervisor who oversees the Comparable Workfare in an Organization.	Conditionally enabled

Supervisor Phone Number	Displays the phone number of the supervisor who oversees the comparable workfare in an Organization.	Conditionally enabled
Supervisor Email Address	Displays the email address of the supervisor who oversees the comparable workfare in an Organization.	Conditionally enabled
Uploaded Documents grid	Displays the document associated to a Comparable Workfare activity entry once selected and uploaded by the user.	Conditionally enabled
Select file	Button. Opens a file browsing window to allow the user to select a document to upload.	Conditionally enabled
Upload	Button. Uploads the selected document to the Comparable Workfare page.	Conditionally enabled
File name	Displays the name of the selected Comparable Workfare document.	Conditionally enabled
Date	Displays the date of the selected Comparable Workfare document.	Conditionally enabled
Size	Displays the file size of the selected Comparable Workfare document.	Conditionally enabled
Progress	Displays the upload status of the Comparable Workfare document. ***NOTE:*** Progress will display 100% once the document has been successfully uploaded.	Conditionally enabled
Action	Displays the printer icon to view the uploaded Comparable Workfare document.	Conditionally enabled
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	Conditionally enabled

29.4 User Actions

The following table details the actions that the user can take on the Comparable Workfare. Each action includes a description.

User Action	Description
Navigation	To navigate to the Comparable Workfare page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Components** hyperlink in the left navigation menu. Click the **Comparable Workfare** tab in the top navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Components** hyperlink in the left navigation menu. Click the **Comparable Workfare** tab in the top navigation menu.

Accessing a select Comparable Workfare	Click the **Pencil icon** hyperlink in Comparable Workfare grid. The user will be able to access and edit the Comparable Workfare record details.
Viewing older Comparable Workfare records	Select a value from the Month dropdown list. The page will display a list of all Comparable Workfare records for the selected value.
Create a new Comparable Workfare record	The Provider, Worker, or System Coordinator will be able to create a Comparable Workfare record by clicking the **Add New** button on the Comparable Workfare page. A blank Comparable Workfare record will display on the page. The following must be completed to create the record: • Organization Information • Organization Name • Organization Description • Organization Street Address • Organization Mailing address • Organization Phone Number • Supervisor Name • Supervisor Phone Number • Supervisor Email Address • Number of hours • Month • Activity Upon completing the form and successfully uploading the documentation, click the **Save** button. The page will save and the new record will populate in the Comparable Workfare summary grid.

30 Non-Compliance Summary Page

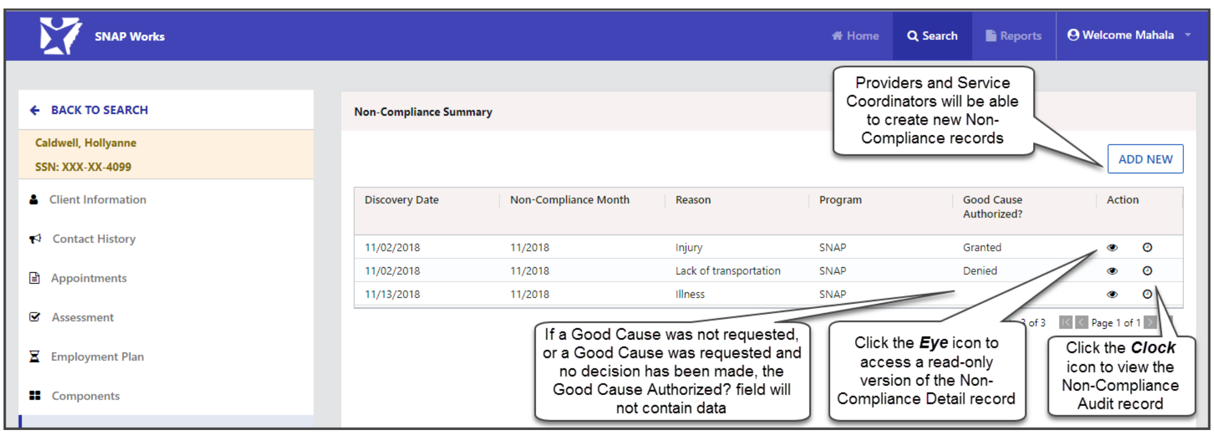
30.1 Overview

The Non-Compliance Summary page will display a list of all of the Non-Compliance records that have been created on the client record. The user will be able to create a Non-Compliance record and a Good Cause request from this location.

The Provider and System Coordinator will be able to create these records; other DHS roles, including the System Coordinator, will be able to complete the Non-Compliance / Good Cause decision. Once a decision has been successfully saved, the form is read only for all users.

30.2 Screenshot

Below is a screenshot of the Non-Compliance Summary page.



30.3 Controls

The following table details the controls that are present on the Non-Compliance Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Add New	Button. When selected, sends the user to a blank Non-Compliance Detail page.	N/A
Non-Compliance Grid	Displays a list of all Non-Compliance records	Display only
Discovery Date	Displays the date that the Non-Compliance was discovered	Display only
Non-Compliance Month	Displays the month and year that the Non-Compliance occurred in	Display only
Reason	Displays the Non-Compliance Reason that was given to the provider by the client	Display only

Program	Name of the Program the client is enrolled into ***SNAP Works*** through	Display only
Good Cause Authorized?	Displays the Good Cause Authorized value from the Non-Compliance Details screen ***NOTE:*** If a decision has not been made, or if Good Cause was not requested, the value will be blank	Display only
	View button, identified as an “eye” that redirects the user to a read-only version of the record	Always enabled
	Audit button, identified as a “clock” that redirects the user to the audit page	Always enabled
Pagination control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

30.4 User Actions

The following table details the actions that the user can take on the Non-Compliance Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Non-Compliance Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Non-Compliance** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Non-Compliance** hyperlink in the left navigation menu.
Creating a record	Click the **Add New** button to access a blank Non-Compliance Detail page.
Editing a record	In the Non-Compliance grid, click the ***Pencil***  icon to access the edit version of the page. ***Note:*** Only DHS Staff, including the System Coordinator, will be able to edit Non-Compliance page. Once the Provider creates the record, the provider will no longer be able to edit the record. The **Pencil**  icon will only be enabled while a decision is pending. Once the decision has been made, the page will be read only for all users.

31 Non-Compliance Details Page

31.1 Overview

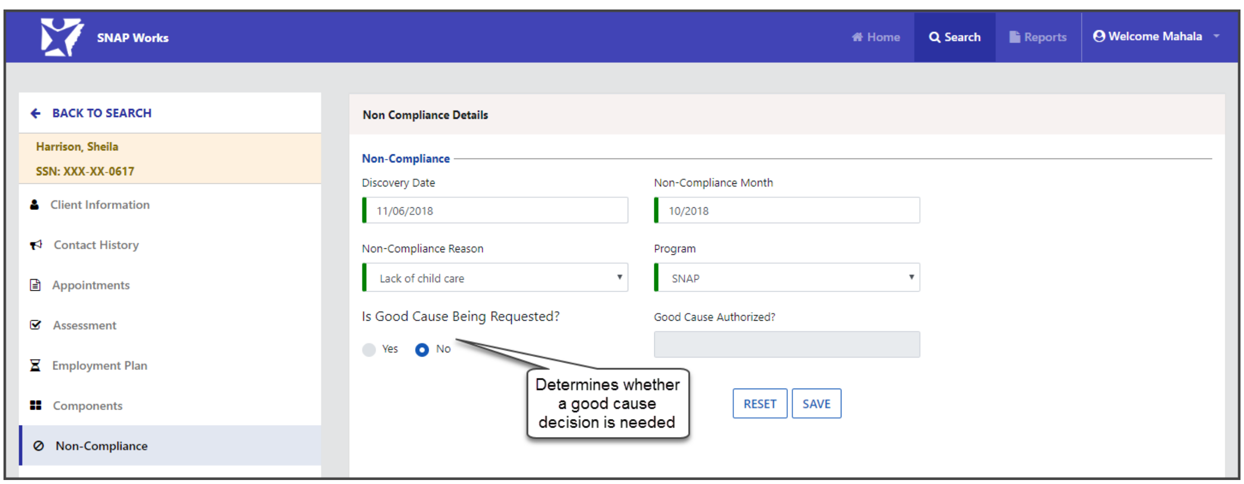
The Non-Compliance Details page captures information when the Client is in non-compliance with their components. The Non-Compliance page also allows the user to be able to request good cause.

The Provider and System Coordinator will be able to create these records; other DHS roles, including the System Coordinator, will be able to complete the Non-Compliance / Good Cause decision. Once a decision has been successfully saved, the form is read only for all users.

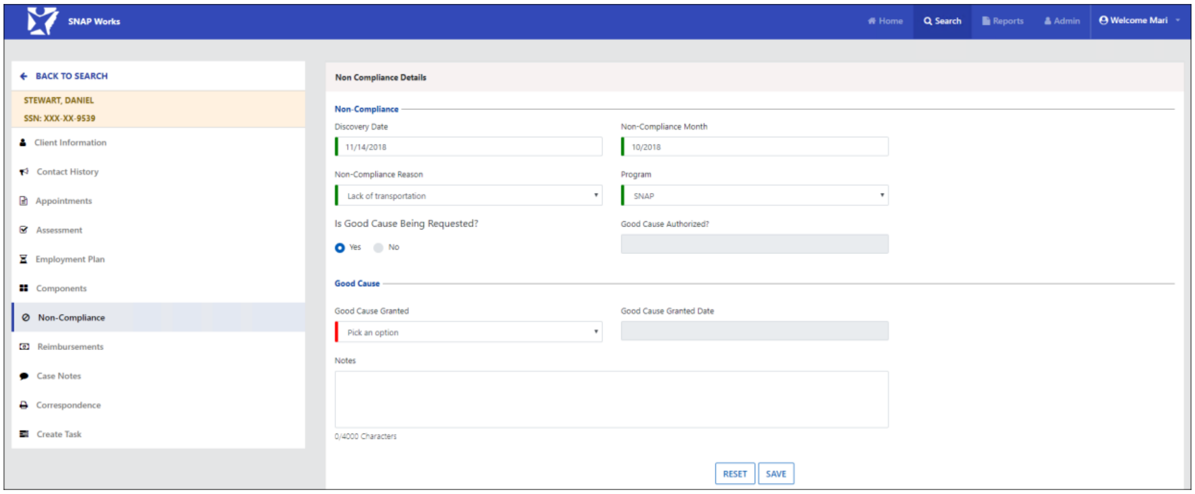
TIP: When recording a request for Non-Compliance in which Good Cause is not requested, the DHS Staff should enter a note in the Notes section and manually close the task.

31.2 Screenshot

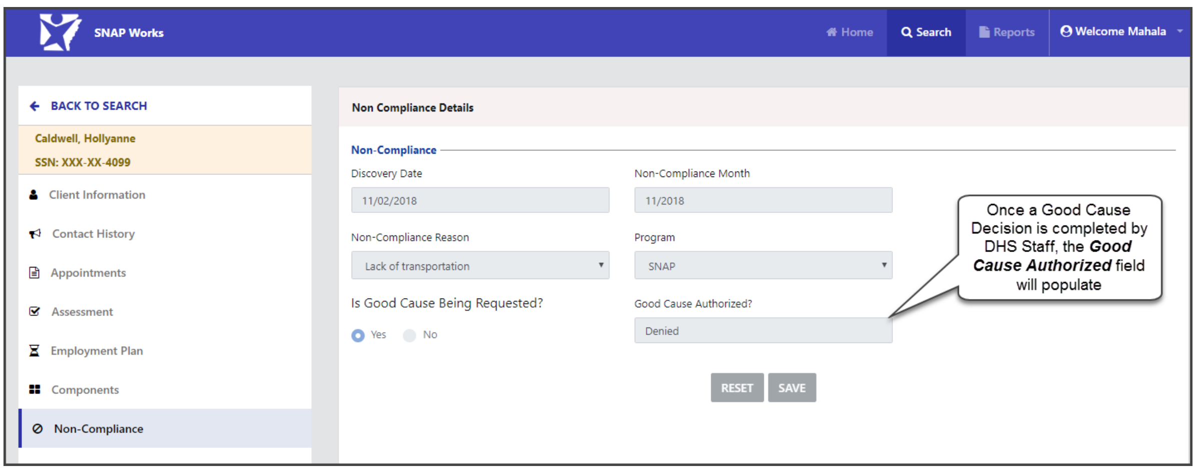
Below are screenshots of the Non-Compliance Details page. In the first example, the Provider or System Coordinator is creating a record.



In this example, the page displays the Good Cause Decision section that the DHS Staff, including the System Coordinator, will complete when the decision has been made.



In this example, System Coordinator or other DHS Staff have completed the Good Cause Decision.



31.3 Controls

The following table details the controls that are present on the Non-Compliance Details Page. Each control includes a description and control type.

Controls	Description	Control Type
Discovery Date	Date picker text box. Allows the user to enter or select the date that the Non-Compliance was discovered. Format: ***mm/dd/yyyy*** Required	Conditionally enabled
Non-Compliance Month	Text box. Allows the user to enter the month and year that the Non-Compliance occurred in. Format: ***mm/yyyy*** Required	Conditionally enabled
Non-Compliance Reason	Dropdown list. Allows the user to select the reason why the Non-Compliance occurred. Required	Conditionally enabled
Program	Dropdown list. Allows the user to select the Program that the client enrolled into ***SNAP Works*** through Required	Conditionally enabled
Is Good Cause Being Requested	Radio buttons. Clicking ***YES*** creates a Good Cause request for the client. Required	Conditionally enabled

Good Cause Authorized	Text box. Displays the Good Cause Decision that the DHS Staff made. ***NOTE:*** The field will be blank if "Is Good Cause Being Requested" = ***NO***, or if "Is Good Cause Being Requested" = ***YES*** *and* a decision has not been made	Display only
Good Cause Granted	Dropdown list. Allows the DHS Staff person to enter a Good Cause Decision ***NOTE:*** This field will not display for the Provider	Conditionally enabled
Good Cause Granted Date	Text box. Displays the date that the Good Cause Decision was made by the DHS Staff person. ***NOTE:*** This field will not display for the Provider	Display only
Notes	Text box. Allows the Provider and DHS User to be able to enter Notes related to the Good Cause Request. ***NOTE:*** The Note field will be required for the Provider when creating a Non-Compliance or Good Cause record when the Non-Compliance Reason = ***Other.***	Conditionally enabled
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Non-Compliance Detail record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

31.4 User Actions

The following table details the actions that the user can take on the Non-Compliance Details Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Non-Compliance Detail page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Non-Compliance** hyperlink in the left navigation menu. Click the **Add New** button, , or icon • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Non-Compliance** hyperlink in the left navigation menu. Click the **Add New** button, icon, or icon

Creating a record	As a Provider or System Coordinator, the user will be able to create a Non-Compliance or Good Cause record by completing the following fields: • Enter a past or current Discovery Date • Enter the Non-Compliance Month in which the non-compliance occurred • Select a value in the Non-Compliance Reason dropdown list • Choose a Program *(SNAP)* • Answer the question "Is Good Cause Being Requested?" If the user selected ***Yes***, a task will be sent to the DHS Worker notifying the worker determine if Good Cause exists. If the user selected ***No,*** a task will be sent to the DHS Worker notifying that the client is not in compliance with the ***SNAP Works*** program. Click the **Save** button to save the changes.
Editing a record	As the System Coordinator or DHS Worker, the user will be able to access the record by either: • Selecting the Task Type hyperlink in the task that was issued • Search for the client and click the Non-Compliance record in the Non-Compliance Summary page. Complete the Good Cause section of the page, by selecting a Good Cause Granted value and if needed, enter Notes. Click the **Save** button to save the changes. ***Note***: A task will be sent to the Provider once the Good Cause decision is successfully saved.

32 Reimbursements Summary Page

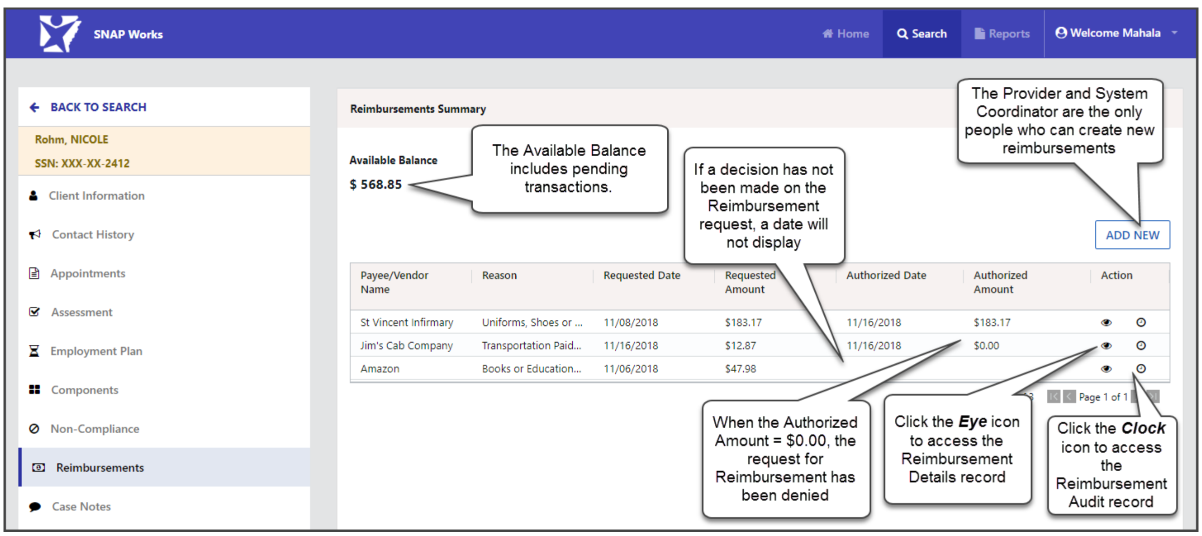
32.1 Overview

The Reimbursements Summary page will display a list of all reimbursements that have been requested on behalf of the client. These reimbursements may be requested for payment directly to the client or to a third party provider.

The Provider and System Coordinator will be able to create these records; all other users will have read access only. The System Coordinator will be able to edit the Reimbursement Details page to complete the Reimbursement Decision.

32.2 Screenshot

Below is a screenshot of the Reimbursements Summary page.



32.3 Controls

The following table details the controls that are present on the Reimbursements Summary Page. Each control includes a description and control type.

Controls	Description	Control Type
Available Balance	Label. Displays the current available balance that is eligible for the current user. ***NOTE:*** The balance resets on October 1 each year	Display only
Payee/Vendor Name	Displays the name of the client or the vendor that was requested to receive payment	Display only
Reason	Displays the reason why the reimbursement was requested	Display only

Requested Date	Displays the date that the reimbursement was requested	Display only
Requested Amount	Displays the reimbursement amount that was requested	Display only
Authorized Date	Displays the date that the Reimbursement Decision was entered ***NOTE:*** This field will be blank if a decision is pending	Display only
Authorized Amount	Displays the amount that was authorized for payment ***NOTE:*** This field will be blank if a decision is pending. If the reimbursement is denied, the authorized amount will display as ***$0.00***	Display only
	Edit button, identified as a "pencil" ***NOTE:*** Providers will not be able to edit a reimbursement once the reimbursement record has been created	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page ***NOTE:*** This action button will only display for Providers once the Reimbursement record is created	Conditionally enabled
Pagination control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

32.4 User Actions

The following table details the actions that the user can take on the Reimbursements Summary Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Reimbursement Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Reimbursements** hyperlink in the left navigation **Reimbursements** menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the hyperlink in the left navigation menu.
Creating a New Reimbursement record	Click the **Add New** button to access a blank Reimbursement Details page.
Editing an existing reimbursement record	DHS Staff, including System Coordinators, will be able to select the  icon, if present, to edit an existing record. When selected, the user will be taken to the Reimbursement Details page. If the  icon does not display on the record, the record is no longer editable.

33 Reimbursements Details Page

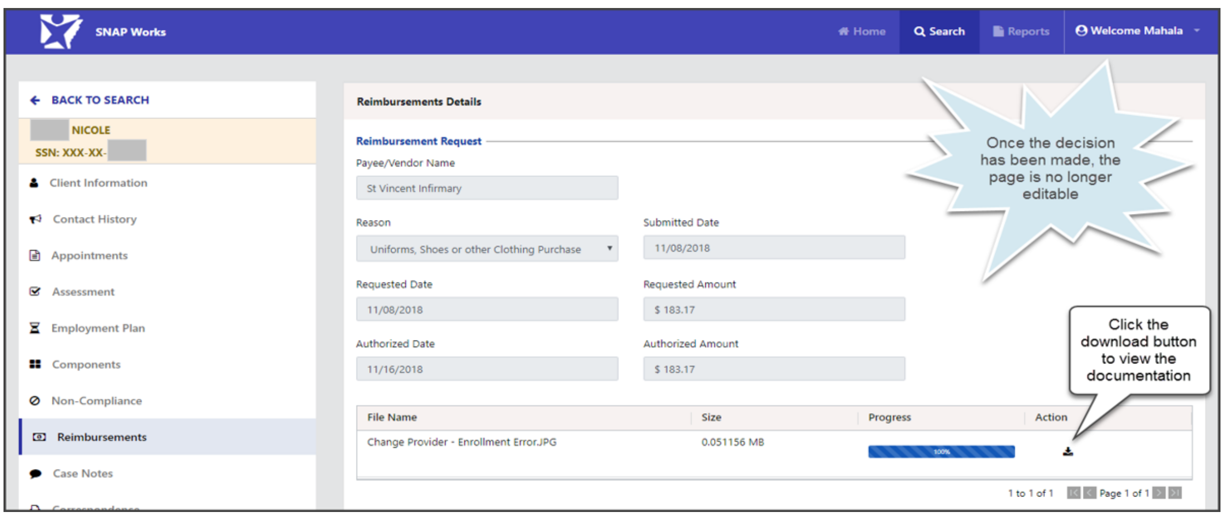
33.1 Overview

The Reimbursement Details page will detail the specifics related to the Reimbursement Request. The Provider or System Coordinator will create the details and upload the necessary documentation that must accompany the Reimbursement. All users will be able to view the record, including the documentation that was uploaded.

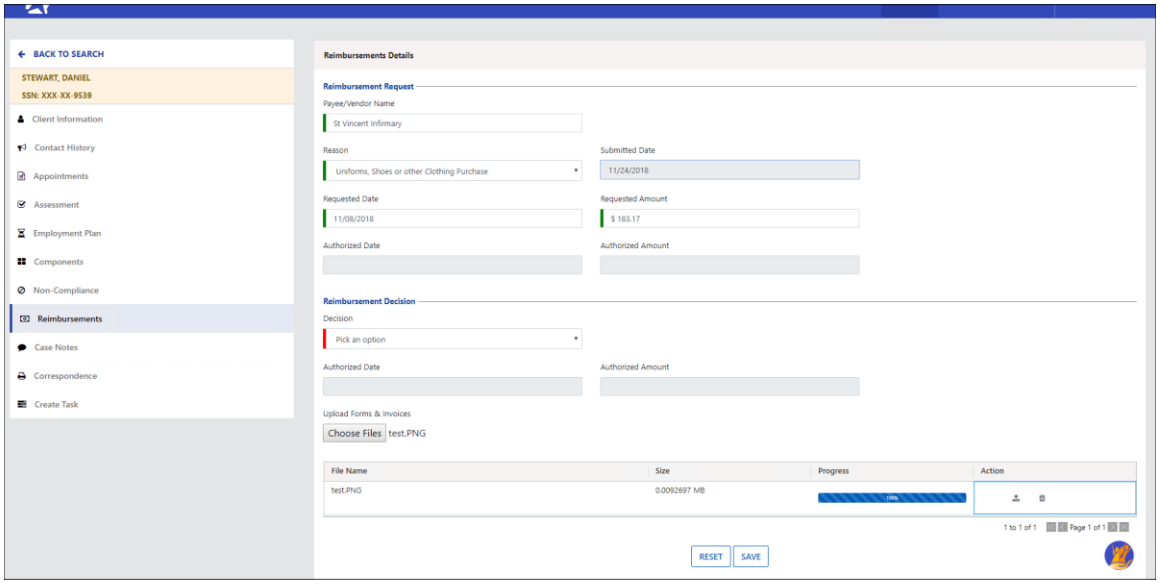
The Provider and System Coordinator will be able to create these records; all other users will have read access only.

33.2 Screenshot

Below is a screenshot of Reimbursement Request section of the page.



The System Coordinator will be able to complete the Reimbursement Decision section of the page.



33.3 Controls

The following table details the controls that are present on the Reimbursement Details Page. Each control includes a description and control type.

Controls	Description	Control Type
Reimbursement Request		
Payee/Vendor Name	Text box. Allows the user to enter the name of the client or a vendor as the person that would receive the reimbursement. Required ***NOTE:*** Once the provider saves the record, the provider cannot edit the page	Conditionally enabled
Reason	Dropdown list. Allows the user to select the reason why the reimbursement is being requested. Required ***NOTE:*** Once the provider saves the record, the provider cannot edit the page	Conditionally enabled
Submitted Date	Text box. Displays the date that the Reimbursement record was created ***NOTE:*** Once the provider saves the record, the provider cannot edit the page	Display only
Requested Date	Date picker text box. Allows the user to enter or select a date that the Reimbursement was requested on. Format: ***mm/dd/yyyy*** Required. ***NOTE:*** Date cannot be a future date Once the provider saves the record, the provider cannot edit the page	Conditionally enabled

Requested Amount	Text box. Allows the user to enter the reimbursement amount. Format: ***##.##*** Required ***NOTE:*** When the Provider or System Coordinator attempts to save the record, if the amount exceeds $50.00 or the total amount requested within a month exceeds $50.00, the user will receive a warning message. The record will still be allowed to save.	Conditionally enabled
Authorized Date	Text box. Displays the date that the DHS Staff entered a decision for the reimbursement request.	Display only
Authorized Amount	Text box. Displays the reimbursement amount once the Reimbursement Decision has been made. ***NOTE:*** If no amount displays, the Reimbursement Request is still pending a decision. If the amount displays as ***$0.00*** the Reimbursement was denied payment.	Display only
Choose Files	Button. Allows the user to upload the necessary documentation that should be provided when submitting a Reimbursement request. *Examples* of documentation that would be uploaded include forms, receipts, and invoices.	N/A
File Upload Grid	Grid that displays all of the documents that were uploaded with a specific reimbursement.	Display only
File Name	Displays the name of the file that was uploaded	Display only
Size	Displays the size of the uploaded document	Display only
Progress	Displays the status of the upload progress	Display only
	Upload button, identified as a "Up symbol"	Conditionally enabled
	Download button, identified as a "Down symbol"	Conditionally enabled
	Delete button, identified as a "Trash Can"	Conditionally enabled
Pagination control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled
Reimbursement Decision		
Decision	Dropdown list. Allows the System Coordinator to select a decision approving or denying the Reimbursement Request. ***NOTE:*** This field will not display for any other role.	Conditionally enabled
Authorized Date	Text box. Displays the date that the System Coordinator entered the Reimbursement Decision ***NOTE:*** This field will not display for any other role.	Conditionally enabled
Authorized Amount	Text box. Displays the reimbursement amount once the Reimbursement Decision has been made.	Display only

	NOTE: If no amount displays, the Reimbursement Request is still pending a decision. If the amount displays as ***$0.00*** the Reimbursement was denied payment.	
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Reimbursement Detail record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

33.4 User Actions

The following table details the actions that the user can take on the Reimbursements Details Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Reimbursement Summary page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Reimbursements** hyperlink in the left navigation menu. Click the **Add New** button or icon to access the Reimbursement Details page. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Reimbursements** hyperlink in the left navigation menu. Click the A**dd New** button or icon to access the Reimbursement Details page.
Creating a New Reimbursement	The Provider or System Coordinator will be able to create a Reimbursement request by clicking the **Add New** button on the Reimbursement Summary page. The user will be taken to a blank Reimbursement Detail page. The following must be completed to create the record: • Payee/Vendor Name • Reason • Requested Date • Requested Amount • Upload all necessary documentation such as invoices, receipts, and DHS form(s) Upon completing the form and successfully uploading the documentation, click the **Save** button. The page will save and the user will be sent to the Reimbursement Summary page.
Uploading documentation	While creating the record, the user, click the **Choose Files** button. The user will need to find the document within their computer files.

	Select the file and click the **Open** button in the pop-up. The document's name will display in the Field Name column of the File grid. Click the icon to initiate the upload process. The Progress Bar will display load and display as 100% when the record has been successfully uploaded. Repeat this process until all documents have been uploaded.
Deleting a document	When a document has been successfully uploaded, the user may delete the record, if the Reimbursement Request has not been saved yet. Click the icon to remove the record. ***Note:*** A document cannot be deleted once the Reimbursement Request has been saved.
Completing the Reimbursement Decision	The System Coordinator can access the Reimbursement record by accessing the record through the Reimbursement Request task or by searching for the client and accessing the Reimbursement Summary page and clicking the icon. View the Documents by clicking the icon on each record. *Procedurally, the user will then access the **Wise Snap** application to complete the necessary work to complete the reimbursement.* Once completed, the user will return to the Reimbursement and complete the Reimbursement Decision and click the **Save** button. Upon successful save, the user will be taken to the Reimbursement Summary screen.

34 Correspondence Documents Page

34.1 Overview

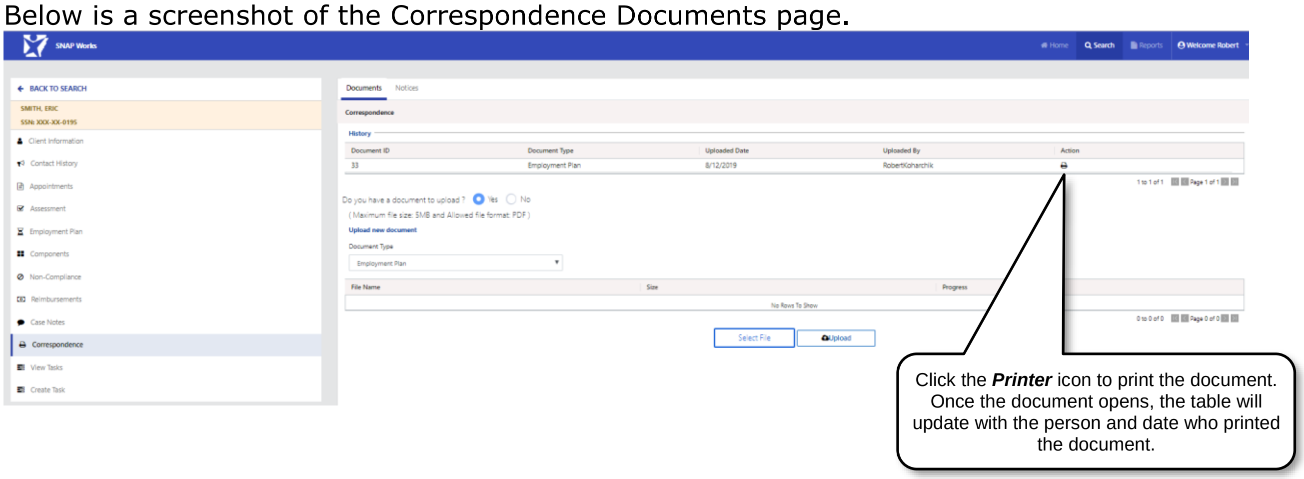
The Correspondence Documents page will display a list of all documentation that has been created by the client and allow for the provider to upload documentation on the Client's behalf. The user may select the following types of documents for upload:

- Employment Plan
- Certifications
- Test Scores
- Comparable Workfare
- Good Cause/Exemption
- Reimbursement Information
- Other

> ***New Feature:*** The user will be able to upload documents directly into the ***SNAP Works*** system and view documents uploaded by the Citizen in the ***SNAP Works Citizen Portal***.

34.2 Screenshot

Below is a screenshot of the Correspondence Documents page.



34.3 Controls

The following table details the controls that are present on the Correspondence Documents Page. Each control includes a description and control type.

Controls	Description	Control Type
Correspondence Grid	Displays a list of all the correspondence that has been generated on the client.	Display only
Document ID	Displays the document ID for the specified correspondence record	Display only
Document Type	Displays the name of the correspondence record that was generated	Display only
	Print button, identified as a "printer"	Always enabled

Pagination Control	Allows the user to page through the results when there are more than 10 records presented	Conditionally enabled
Upload Response	Radio Buttons. If "Yes" is specified in response to the question "Do you have a document to upload?", the Upload Document grid will display.	Always enabled
Document Type	Dropdown list. Enables the user to specify the type of document being uploaded from the following choices: • Employment Plan • Certifications • Test Scores • Comparable Workfare • Good Cause/Exemption • Reimbursement Information • Other	Conditionally enabled
Upload Document Grid	Displays documents selected by the user for upload	Conditionally enabled
File Name	Displays the name of the file to be uploaded	Display Only
Size	Displays the size of the file to be uploaded	Display Only
Progress	Displays the progress of the file upload	Display Only
Select File	Button. Allows the user to browse their documents in order to select a document for upload	Always Enabled
Upload	Button. Uploads the document selected by the citizen	Always Enabled
Save	Button. Validates the fields have been documented and records the entry	Conditionally Enabled

34.4 User Actions

The following table details the actions that the user can take on the Correspondence Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Correspondence page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Correspondence** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Correspondence** hyperlink in the left navigation menu.
Uploading documentation	While creating the record, the user, click the **Select File** button. The user will need to find the document within their computer files. Select the file and click the **Open** button in the pop-up. The document's name will display in the Field Name column of the File grid.

	Click the icon to initiate the upload process. The Progress Bar will display load and display as 100% when the record has been successfully uploaded. Repeat this process until all documents have been uploaded.
Deleting a document	When a document has been successfully uploaded, the user may delete the record, if the Reimbursement Request has not been saved yet. Click the icon to remove the record. ***Note:*** A document cannot be deleted once the Reimbursement Request has been saved.
Printing a Document	Click the **Print** icon for the selected record. A PDF of the document will display. Print the document.

35 Correspondence Notices Page

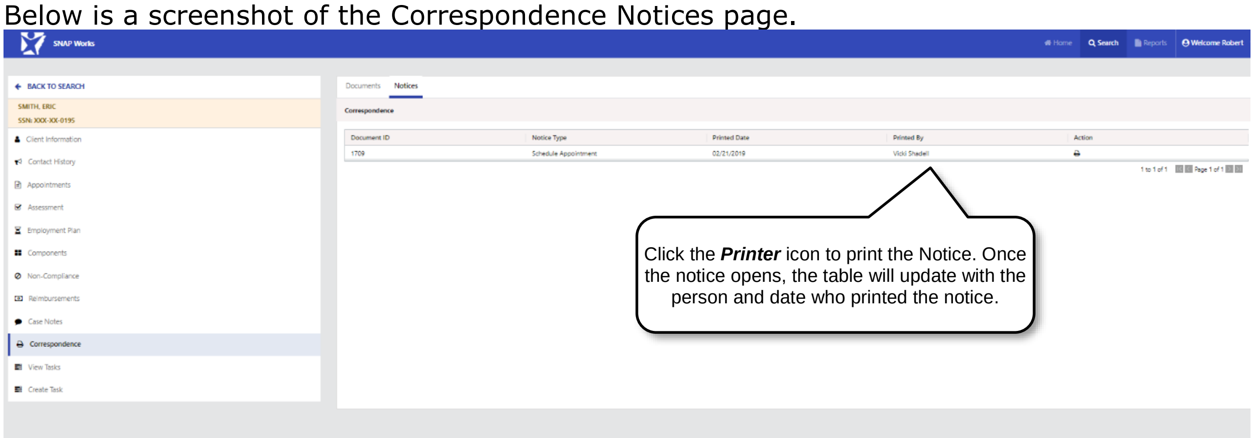
35.1 Overview

The Correspondence Notices page will display a list of all system generated notices that have been created on the Client's behalf.

All users will have read only access to this page.

35.2 Screenshot

Below is a screenshot of the Correspondence Notices page.



35.3 Controls

The following table details the controls that are present on the Correspondence Page. Each control includes a description and control type.

Controls	Description	Control Type
Correspondence Grid	Displays a list of all the notices that have been generated for the client.	Display only
Document ID	Displays the system generated document ID created for the notice	Display only
Notice Type	Displays the name of the notice that was generated	Display only
Printed Date	Displays the date the document was printed. ***NOTE:*** If a date does not display, the document has not been printed	Display only
Printed By	Displays the name of the person who printed the document. ***NOTE:*** If a name does not display, the document has not been printed	Display only
	Print button, identified as a "printer"	Always enabled

Pagination Control	Allows the user to page through the results when there are more than 10 records presented	Conditionally enabled

35.4 User Actions

The following table details the actions that the user can take on the Correspondence Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Correspondence page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Correspondence** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Correspondence** hyperlink in the left navigation menu.
Printing a Notice	Click the **Print** icon for the selected record. A PDF of the document will display. Print the document. ***NOTE:*** Once the document has been printed, the Correspondence grid will update to display the date the document was printed and the person who printed the document.

36 Create Task Page

36.1 Overview

The Create Task Page is the preferred communication mechanism to allow DHS Staff and Providers be able to communicate actions that need to take place related to a client that cannot be handled automatically by the ***SNAP Works*** application. To create a task, the user must first access the client record and then navigate to the Create Task page by selecting the **Create Task** hyperlink in the left menu.

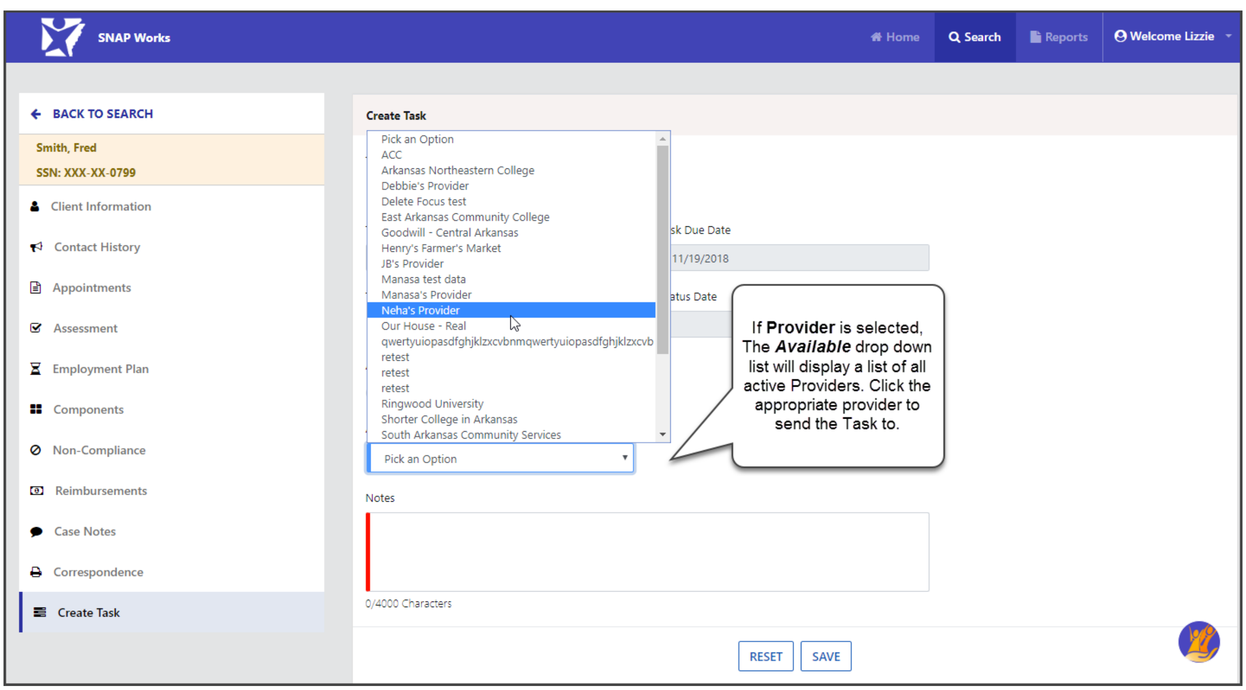
All users will have access to create records from this page.

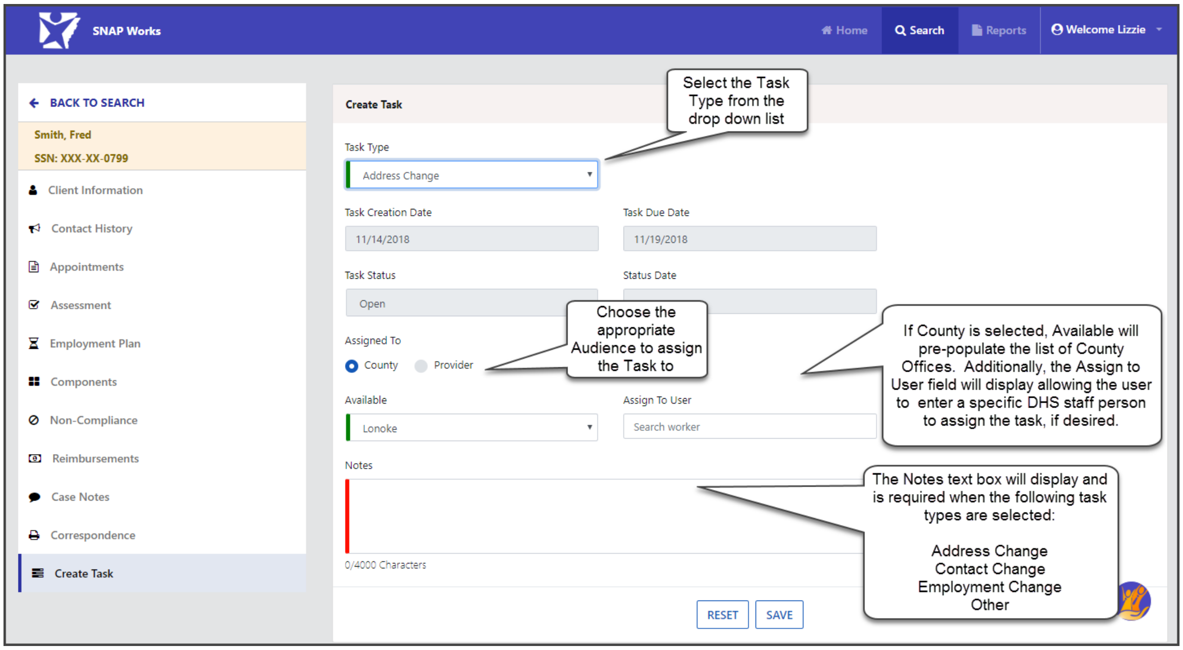
TIP: On the Create Task Page, users should only create tasks that will not be automatically created through other actions in the ***SNAP Works*** application.

Refer to Appendix A – Task Matrix for details on which tasks will be automatically created.

36.2 Screenshot

Below are screenshots of the Create Task page. Based on the **Task Type** selected, or the **Assign To** radio button selected, additional fields may display on the page.





36.3 Controls

The following table details the controls that are present on the Create Task Page. Each control includes a description and control type.

Controls	Description	Control Type
Task Type	Dropdown list. Allows the user to select the type of task they wish to create	Always enabled
Task Creation Date	Text box. Displays the date that the Task is being created	Display only
Task Due Date	Text box. Displays the due date of the task. Refer to Appendix A – Task Matrix for more details related to tasks.	Display only
Task Status	Text box. Displays the status of the task. When creating the task, the status will display as ***Open***.	Display only
Status Date	Text box. Displays the date that the Status was updated. ***NOTE:*** This field will not display a value while creating a task.	Display only
Assigned To	Radio Buttons. Determines which assignment list will display in the Available dropdown list	Always enabled
Assign to user	Elastic Search. Displays when Assigned To = ***County*** and a County Office is selected from the Available dropdown list	Conditionally enabled
Notes	Text Box. Will display when the Task Type is one of the following: • Address Change • Contact Change • Employment Change	Conditionally enabled

	• Other	
Reset	Button. Resets the page to a blank status or a previously saved status, based on if the user is creating or updating the Task record	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

36.4 User Actions

The following table details the actions that the user can take on the Create Task Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Create Task page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **Create Task** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **Create Task** hyperlink in the left navigation menu.
Task Type	When any of the following task types are selected, the Notes text box will display to allow the user to communicate the change required. • Address Change • Contact Change • Employment Change • Other
Assigned To	When the user selects the **County** button, the **Available** dropdown list will pre-populate with a list of all DHS County offices. When **Provider** is selected. The **Available** dropdown list will display a list of all active Providers associated to ***SNAP Works****.*
Available	When Assigned to is set to **County** and a County has been selected from the **Available** dropdown list, the **Assign to User** button will enable to allow the user to complete an elastic search of all DHS staff that are associated to the specific county selected.
Assign to User	Entering data in the **Assign to User** elastic search will allow the system to provide a dropdown list of active DHS staff that fit the search criteria entered. Click a record from the dropdown list to assign the task to the specific user.
Reset	Click the ***Reset*** button to reset the page back to the original status it was in when the user first accessed the page
Save	Click the ***Save*** button to send the task to its intended audience. The system will display one or more notification to allow the user to know if the transaction was successful or display notifications of missing or invalid information that is preventing the system from saving the data.

37 Executive Dashboard Page

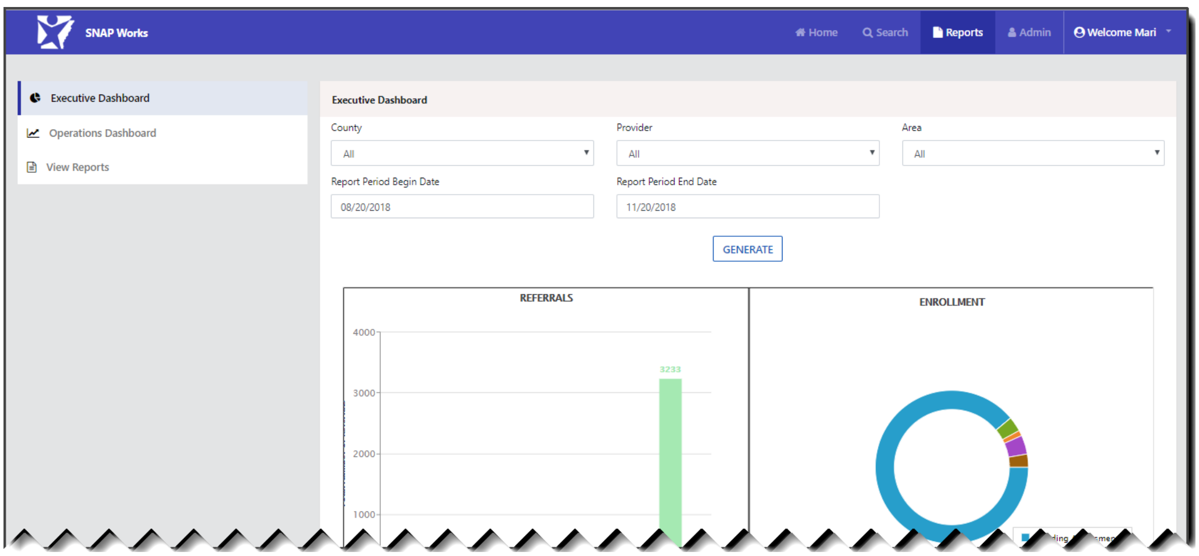
37.1 Overview

The Executive Dashboard page will display graphs and charts related to the caseload of the user. The page will display referral, enrollment, and non-compliance information pertinent to the user.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

37.2 Screenshot

Below is a screenshot of the Executive Dashboard.



37.3 Controls

The following table details the controls that are present on the Executive Dashboard Page. Each control includes a description and control type.

Controls	Description	Control Type
County	Dropdown list. Displays a list of all of the Counties associated to the user.	Always enabled
Provider	Dropdown list. Displays a list of providers that are associated to the user's counties. ***NOTE:*** Providers will only be able to see their own records. This dropdown list may be disabled based on the user's role.	Conditionally enabled

Area	Dropdown list. Displays a list of areas within the state that are associated to the user. ***NOTE:*** Area Supervisors and System Coordinators are the only roles that will be able to view the dashboard by Area	Conditionally enabled
Report Period Begin Date	Date picker text box. Allows the user to enter or select a start date to filter the results for a specified time frame. ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Report Period End Date	Date picker text box. Allows the user to enter or select and end date to filter the results for a specified time frame. ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Generate	Button. Select any filters desired and click the **Generate** button to refresh the graphs to display the data based on the filters selected	N/A
Referrals	Bar graph that display the total number of referrals received	Display only
Enrollment	Donut chart that displays the Enrollment Statistics for the ***SNAP Works*** application. The Donut chart will display the following information: • Pending Assessment • Non-Compliance • Pending Appointment • Employment Plan • Component • Active Participant (Participating in at least one component)	Display only
Non-Compliance by County	Heat map of the number of non-compliant ***SNAP Works*** participants by county The Heat Map is color coded as follows: • 1-10 = Light Green • 11-20 = Dark Green • 21-30 = Light Purple • 31-40 = Orange • 41+ = Red ***NOTE:*** Using the mouse, hover over a county to see the number of clients that are non-compliant during the specified time period	Display only

37.4 User Actions

The following table details the actions that the user can take on the Executive Dashboard Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Executive Dashboard page, click the **Reports** button in Global Menu. The page will default to the *Executive Dashboard*
Updating the Charts and Graphs	When the page loads, all records for the last 90 days will display. The user may filter the data to look at a different time range or a smaller sub-set of the data. Update the parameters to review the new data. Upon selecting the new parameters, click the **Generate** button. The page will reload to show the data based on the new filters.
Viewing Details on the Non-Compliance Heat Map	Using the mouse, hover over a specific county (e.g., Boone county). The Name of the County and the number of people who are currently in non-compliance with the ***SNAP Works*** program will display.

38 Operations Dashboard Page

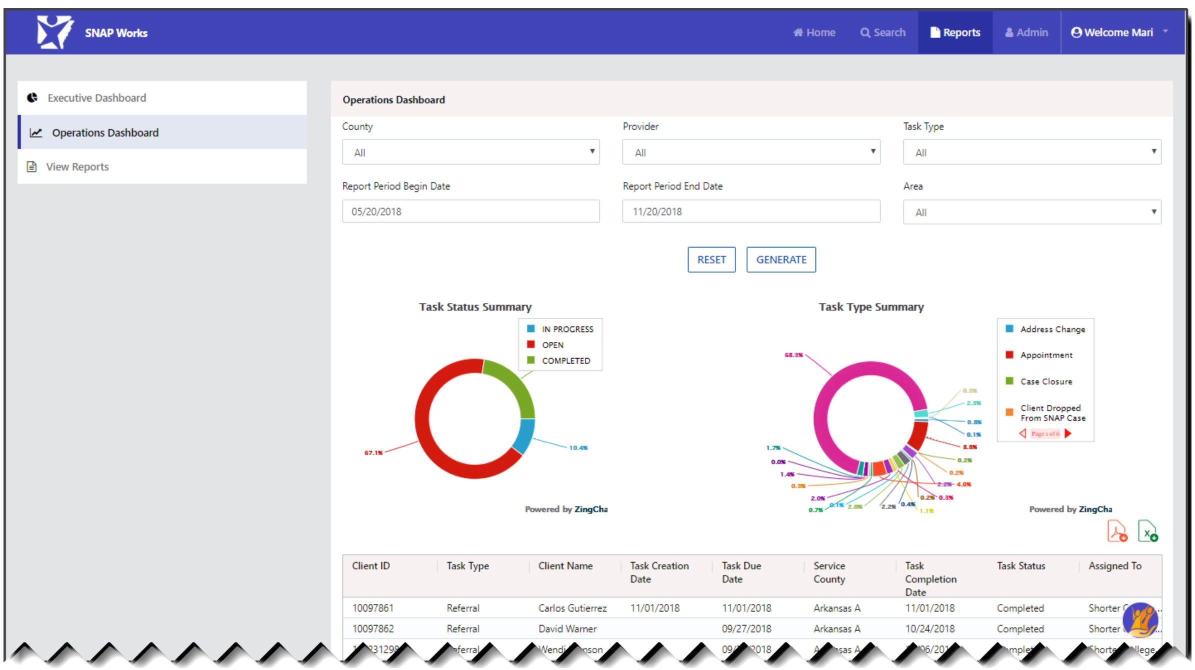
38.1 Overview

The Operations Dashboard page displays important information related to the tasks associated to the user. The user will be able to see their tasks by status and by type, as well as be able to export their task list for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

38.2 Screenshot

Below is a screenshot of the Operations Dashboard.



38.3 Controls

The following table details the controls that are present on the Operations Dashboard Page. Each control includes a description and control type.

Controls	Description	Control Type
County	Dropdown list. Displays a list of all of the Counties associated to the user.	Always enabled
Provider	Dropdown list. Displays a list of providers that are associated to the user's counties. ***NOTE:*** Providers will only be able to see their own records.	Conditionally enabled

	This dropdown list may be disabled based on the user's role.	
Task Type	Dropdown list. Displays a list of all of the task types	Always enabled
Report Period Begin Date	Date picker text box. Allows the user to enter or select a start date to filter the results for a specified time frame. ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Report Period End Date	Date picker text box. Allows the user to enter or select and end date to filter the results for a specified time frame. ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Area	Dropdown list. Displays a list of areas within the state that are associated to the user. ***NOTE:*** Area Supervisors and System Coordinators are the only roles that will be able to view the dashboard by Area	Conditionally enabled
Reset	Button. Resets the page to the default status	N/A
Generate	Button. Select any filters desired and click the **Generate** button to refresh the charts and table to display the data based on the filters selected	N/A
Task Status Summary	Donut Chart. Displays the percentages of tasks by status. Status types include: • In Progress • Open • Completed	Display only
Task Type Summary	Donut Chart. Displays a summary of the tasks by type. Task types include, but may not be limited to: • Appointment • Employment Change • Exemption Request • Good Cause Decision • Good Cause Request • Monthly Track Component • Non-Compliance Decision • Non-Compliance Request • Other • Reimbursement Decision • Referral	Display only
Export (PDF)	Click the icon to export the Task Results Table to a PDF document	Always enabled

Export (Excel)	Click the icon to export the Task Results Table to an Excel document	Always enabled
Task Results Table	Displays a list of all tasks based on the filters selected.	Display only
Client ID	Displays the Client identification number associated to the Client	Display only
Task Type	Displays the name of the task	Display only
Client Name	Displays the name of the Client	Display only
Task Creation Date	Displays the date that the task was created	Display only
Task Due Date	Displays the date that the Task was due	Display only
Service County	Displays the Service County that the Client's SNAP record is associated to	Display only
Task Completion Date	Displays the date that the Task was completed. ***NOTE:*** If a date does not display, the task is not completed	Display only
Task Status	Displays the current status of the task	Display only
Assigned to	Displays the Provider, County or DHS Worker the task is assigned to	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

38.4 User Actions

The following table details the actions that the user can take on the Operations Dashboard Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the Operations Dashboard page, click the **Reports** button in Global Menu. Click the **Operations Dashboard** hyperlink in the left menu
Updating the Charts and Graphs using the parameters	When the page loads, all records for the last 90 days will display. The user may filter the data to look at a different time range or a smaller sub-set of the data. Update the parameters to review the new data. Upon selecting the new parameters, click the **Generate** button. The page will reload to show the data based on the new filters.
Exporting the Task List	The user can export the Tasks displayed on the page by clicking the **PDF** or **Excel** icon.
Filtering the Task List using the Donut Charts	By selecting a portion of the Task Status Summary or Task Type Summary donut charts, the Task List will update to display those tasks that meet the criteria selected from the donut chart.

For example: Selecting the "In Progress" portion of the Task Status Summary donut chart, will refresh the Task List to display only those tasks that are "In Progress".

39 View Reports Parameters Page

39.1 Overview

The View Reports section of the Reports allows the user to enter parameters to run three reports:

- Component Progress – Client Level
- Component Progress – Roll Up
- Educational Gains – Roll Up
- Employment & Training Retention Report
- Monthly Snapshot – Details Report
- Monthly Snapshot – Rollup Report
- Component Activity Report

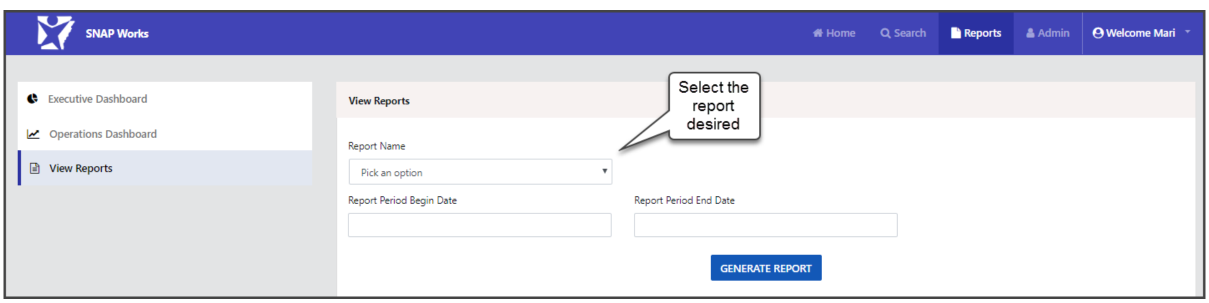
All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

New Feature:
Employment & Training Retention Report
Monthly Snapshot – Details Report
Monthly Snapshot – Rollup Report
Component Activity Report

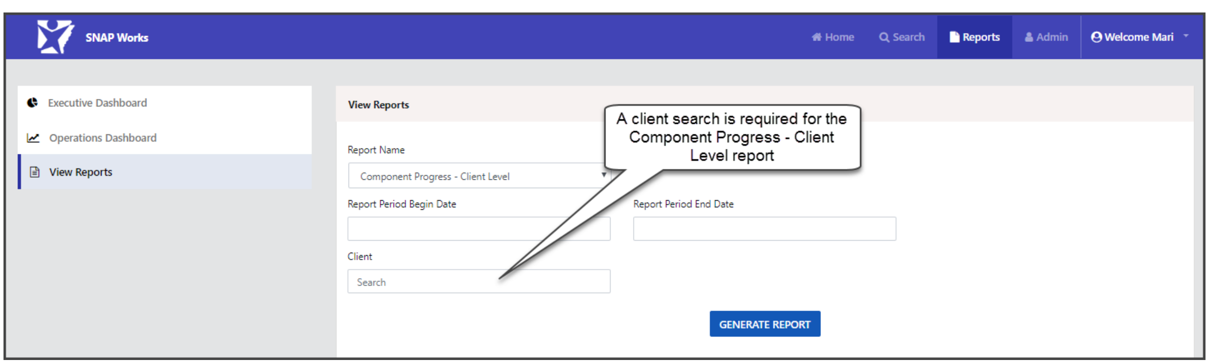
39.2 Screenshot

Below is a screenshot of the how the View Reports parameters display based on the report selected.

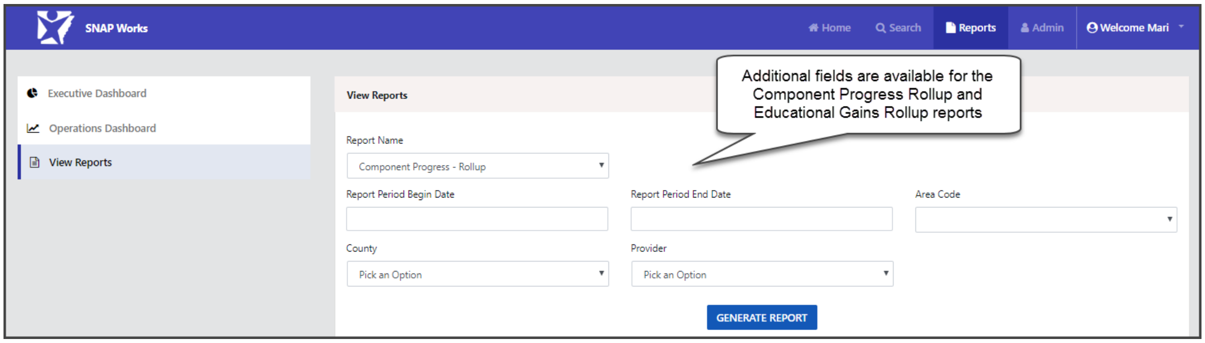
Example: No report has been selected.



Example: Component Progress – Client Level Report has been selected.



Example: Educational Gains – Roll Up Report has been selected. ***NOTE:*** *The Same Parameters will display for the Component Progress – Roll Up report.*



39.3 Controls

The following table details the controls that are present on the View Reports Page. Each control includes a description and control type.

Controls	Description	Control Type
Report Name	Dropdown list. Allows the user to select the report to generate. Required	Always enabled
Report Period Begin Date	Date picker text box. Allows the user to enter or select a start date to filter the results for a specified time frame. Required ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Report Period End Date	Date picker text box. Allows the user to enter or select and end date to filter the results for a specified time frame. Required ***NOTE:*** The Report Period Begin and End Date will default to the last 90 days	Always enabled
Client	Elastic search. Begin entering a first or last name in the text box. As more characters are entered, the results will filter to display in a dropdown list that can be selected. Required ***NOTE:*** The Client text box will only display when the Report Name = ***Component Progress – Client Level***	Conditionally enabled
Area	Dropdown list. Displays a list of areas within the state that are associated to the user. ***NOTE:*** Area Supervisors and System Coordinators are the only roles that will be able to view the dashboard by Area The Area dropdown list will not display when the Report Name = ***Component Progress – Client Level*** or ***Component Activity***	Conditionally enabled

County	Dropdown list. Displays a list of counties within the state that are associated to the user. ***NOTE:*** The County dropdown list will not display when the Report Name = ***Component Progress – Client Level***	Conditionally enabled
Provider	Dropdown list. Displays a list of active providers within the state that are associated to the user's County assignment(s). ***NOTE:*** The Provider dropdown list will not display when the Report Name = ***Component Progress – Client Level***	Conditionally enabled
Participation Type	Dropdown list. Displays a list of SNAP Works program participation types. ***NOTE:*** The Participation Type dropdown list will only display when the Report Name = ***Component Progress – Rollup*** or ***Employment & Training Retention.***	Conditionally enabled
Month	Textbox. Allows the user to enter the month and year in mm/yyyy format to filter the results for a specified month. Required ***NOTE:*** The Month textbox will only display when the Report Name = ***Monthly snapshot details*** or ***Monthly Snapshot - Rollup***	Conditionally enabled
Minimum Age	Textbox. Allows the user to enter or select a minimum age to filter the results for a specified age range. ***NOTE:*** The Minimum Age textbox will only display when the Report Name = ***Potential Candidates***	Conditionally enabled
Maximum Age	Textbox. Allows the user to enter or select a maximum age to filter the results for a specified age range. ***NOTE:*** The Maximum Age textbox will only display when the Report Name = ***Potential Candidates***	Conditionally enabled
Work Participation	Dropdown list. Displays a list of work participation characteristics to filter the results for a specified work participation characteristic type. ***NOTE:*** The Work Participation dropdown list will only display when the Report Name = ***Potential Candidates***	Conditionally enabled
Generate Report	Button. When selected, the system will generate a report below the **Generate Report** button, based on the filters selected. If no results are found, the system will display a message.	Always enabled

39.4 User Actions

The following table details the actions that the user can take on the View Reports Page. Each action includes a description.

User Action	Description
Navigation	To navigate to the View Reports page, click the **Reports** button in Global Menu. Click the **View Reports** hyperlink in the left menu
Using the Parameter Page to create a Component Progress – Client Level Report	Click the value ***Component Progress – Client Level*** from the Report Name dropdown list. Once the page loads, enter the time frame and search for a client. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing
Using the Parameter Page to create a Component Progress – Roll Up Report	Click the value ***Component Progress – Roll Up*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.
Using the Parameter Page to create an Educational Gains – Roll Up Report	Click the value ***Educational Gains – Roll Up*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.
Using the Parameter Page to create an Employment & Training Retention Report	Click the value ***Employment & Training Retention*** from the Report Name dropdown list. Once the page loads, enter the County and Provider. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.
Using the Parameter Page to create a Monthly Snapshot – Details Report	Click the value ***Monthly Snapshot - Details*** from the Report Name dropdown list. Once the page loads, enter the Month and select the County and Provider. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing.

	***NOTE**:* Based on the user's role, one or more of the fields may not display.
Using the Parameter Page to create an Monthly Snapshot - Rollup Report	Click the value ***Monthly Snapshot – Roll Up*** from the Report Name dropdown list. Once the page loads, enter the Month and select the County and Provider. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE**:* Based on the user's role, one or more of the fields may not display.
Using the Parameter Page to create a Component Activity Report	Click the value ***Component Activity*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County or Provider. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE**:* Based on the user's role, one or more of the fields may not display.

40 Component Progress – Client Level Report

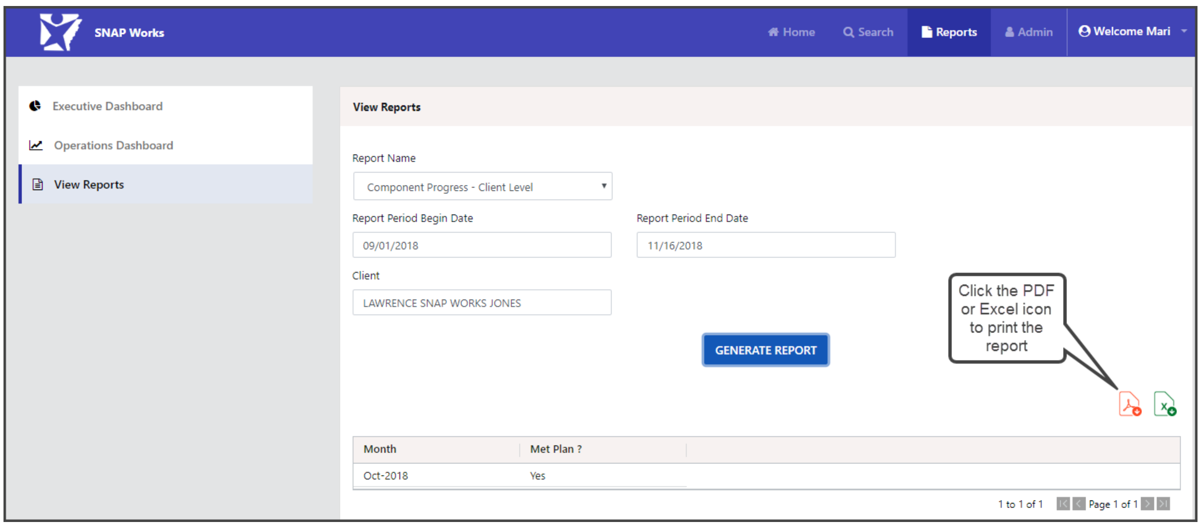
40.1 Overview

The Overall Progress – Client Level Report will allow the user to search for a specific client to see the overall progress of that client's components over a time range. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

40.2 Screenshot

Below is a screenshot of the Overall Progress – Client Level Report.



40.3 Controls

The following table details the controls that are present on the Component Progress – Client Level Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Component Progress – Client Level Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Component Progress – Client Level Report display to an Excel document	Always enabled
Component Client Level Table	Displays a list records based on the filters selected.	Display only
Month	Displays the Month and Year	Display only

Met Plan	Displays the overall progress of all of the components for each specified month	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

40.4 User Actions

The following table details the actions that the user can take on the Component Progress – Client Level Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Component Progress – Client Level*** from the Report Name dropdown list. Once the page loads, enter the time frame and search for a client. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing

41 Component Progress – Roll Up Report

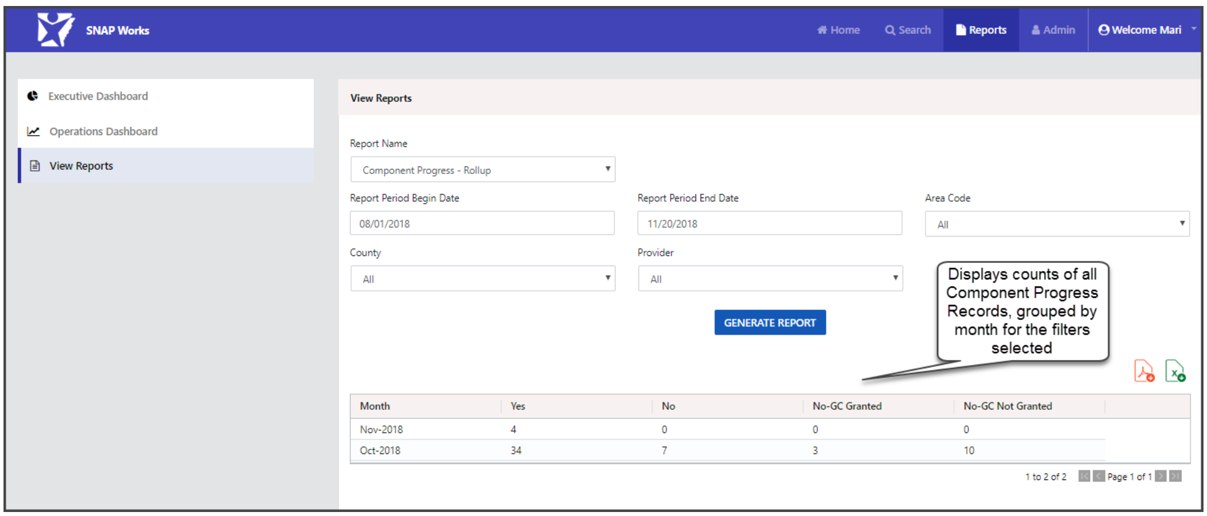
41.1 Overview

The Overall Progress – Roll Up Report will allow the user to see the overall progress of all of the clients' components over a time range. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

41.2 Screenshot

Below is a screenshot of the Component Progress – Roll Up Report



41.3 Controls

The following table details the controls that are present on the Component Progress – Roll Up Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Component Progress – Roll Up Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Component Progress – Roll Up Report display to an Excel document	Always enabled
Component Roll Up Table	Displays a list records based on the filters selected.	Display only
Month	Displays the Month and Year for the Compliant Progress	Display only

Yes	Displays a total number of clients which the Overall Progress for the specified month = ***Yes***	Display only
No	Displays a total number of clients which the Overall Progress for the specified month = ***No***	Display only
No-GC Granted	Displays a total number of clients which the Overall Progress for the specified month = ***No-GC Granted***	Display only
No-GC Not Granted	Displays a total number of clients which the Overall Progress for the specified month = ***No-GC Not Granted***	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

41.4 User Actions

The following table details the actions that the user can take on the Component Progress – Roll Up Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Component Progress – Roll Up*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.

42 Educational Gains Report

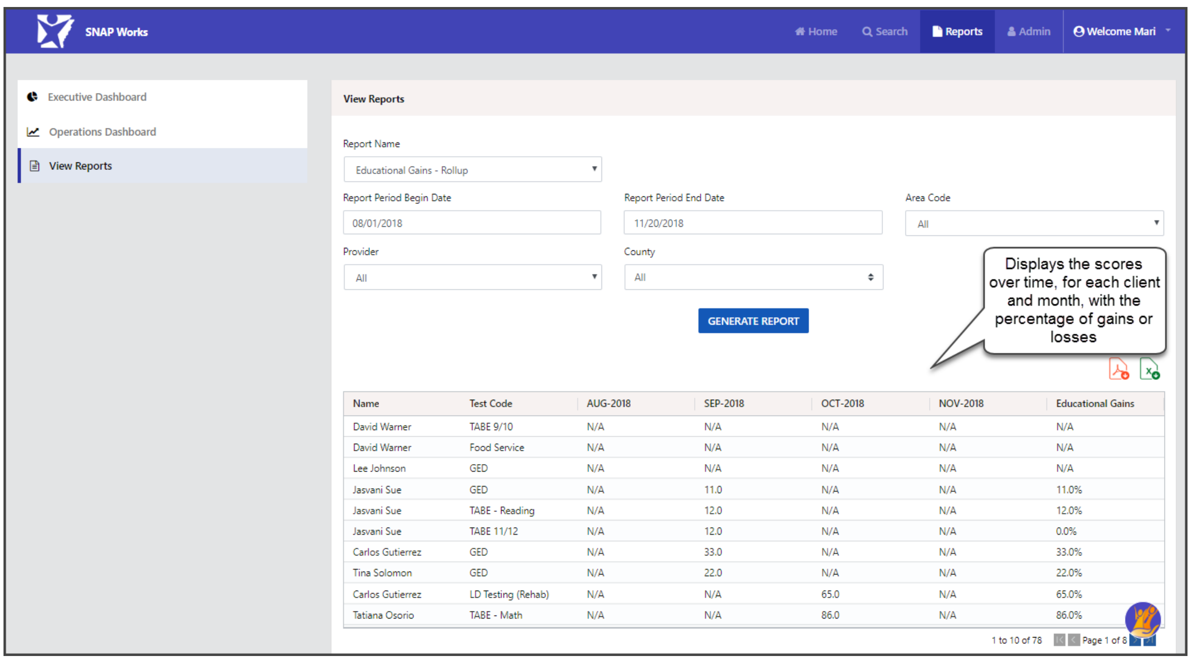
42.1 Overview

The Educational Gains – Roll Up Report will allow the user to see the educational gains of all of their clients' test scores over a time range. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

42.2 Screenshot

Below is a screenshot of the Educational Gains – Roll Up Report.



42.3 Controls

The following table details the controls that are present on the Educational Gains Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Educational Gains – Roll Up Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Educational Gains – Roll Up Report display to an Excel document	Always enabled

Educational Gains Table	Refer to [Appendix F – Instructions for Learning Gain Scores] for information on how the Educational Gains are calculated	Display only
Client	Displays the name of the client with test scores for the filtered parameters entered	Display only
Test Taken	Displays the name of the Test that the client received scores on	Display only
Month YYYY	Displays a column for each month and year that fall within the Report Period Begin Date and Report Period End Date *Example:* If the Report Period Begin Date is 08/01/2018 and the Report Period End Date is 11/20/2018, a column will display for each month: • Aug 2018 • Sep 2018 • Oct 2018 • Nov 2018	Display only
Educational Gains	Refer to [Appendix F – Instructions for Learning Gain Scores] for information on how the Educational Gains are calculated	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally Enabled

42.4 User Actions

The following table details the actions that the user can take on the Educational Gains Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Educational Gains – Roll Up*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.

43 Employment & Training Retention Report

43.1 Overview

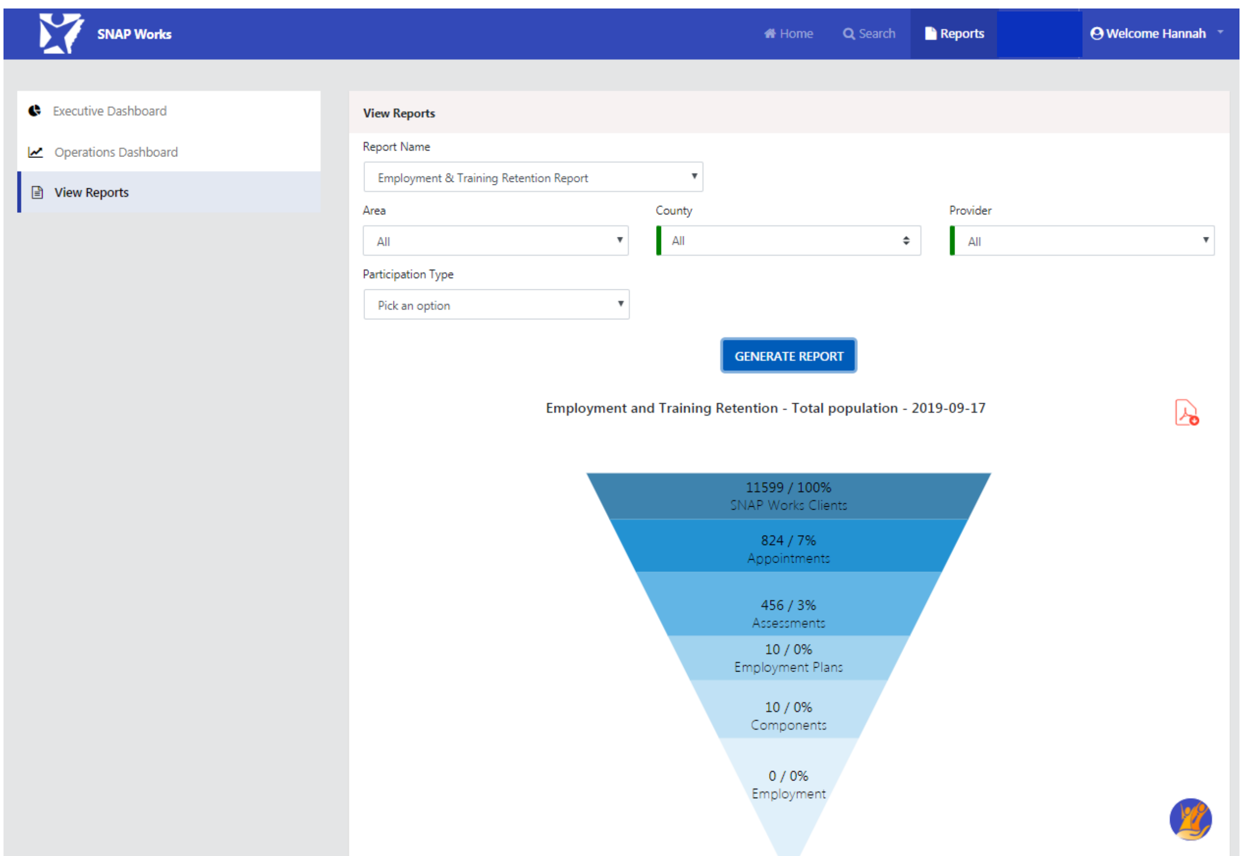
The Employment & Training Retention Report will allow the user to see the number of SNAP Works participants who achieve each stage in the E&T program and ultimately gain employment. The user will be able to export the report to a PDF document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

New Feature: Employment & Training Retention Report

43.2 Screenshot

Below is a screenshot of the Employment & Training Retention Report.



43.3 Controls

The following table details the controls that are present on the Educational Gains Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Educational Gains – Roll Up Report display to a PDF document	Always enabled
Employment & Training Pyramid	Displays a graphic showing employment & training retention statistics based on the filters selected	Display only
SNAP Works Clients	Displays the distinct count of individuals in the SNAP Works system	Display only
Appointments	Displays the distinct count of clients who have at least one appointment marked as 'Show', 'Rescheduled', or 'Show' in the SNAP Works System based of the filters selected	Display only
Assessments	Displays the distinct count of clients who have at least one assessment marked as 'In Progress' or 'Completed' in the SNAP Works System based on the filters selected	Display only
Employment Plans	Displays the distinct count of clients who have at least one employment plan marked as 'Open' or 'Closed' in the SNAP Works System based on the filters selected	Display only
Components	Displays the distinct count of clients who have at least one component added in the SNAP Works system based on the filters selected	Display only
Employment	Displays the distinct count of clients whose latest Employment Plan has an Employment Plan status of 'Closed' with a Closure Reason of 'Subsidized Employment' or 'Unsubsidized Employment' in the SNAP Works system based on the filters selected	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally Enabled

43.4 User Actions

The following table details the actions that the user can take on the Employment & Training Retention Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Employment & Training Retention Report*** from the Report Name dropdown list. Once the page loads, enter the time frame and select a County, Provider, Participation Type or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing.

***NOTE**:* Based on the user's role, one or more of the fields may not display.

44 Monthly Snapshot – Details Report

44.1 Overview

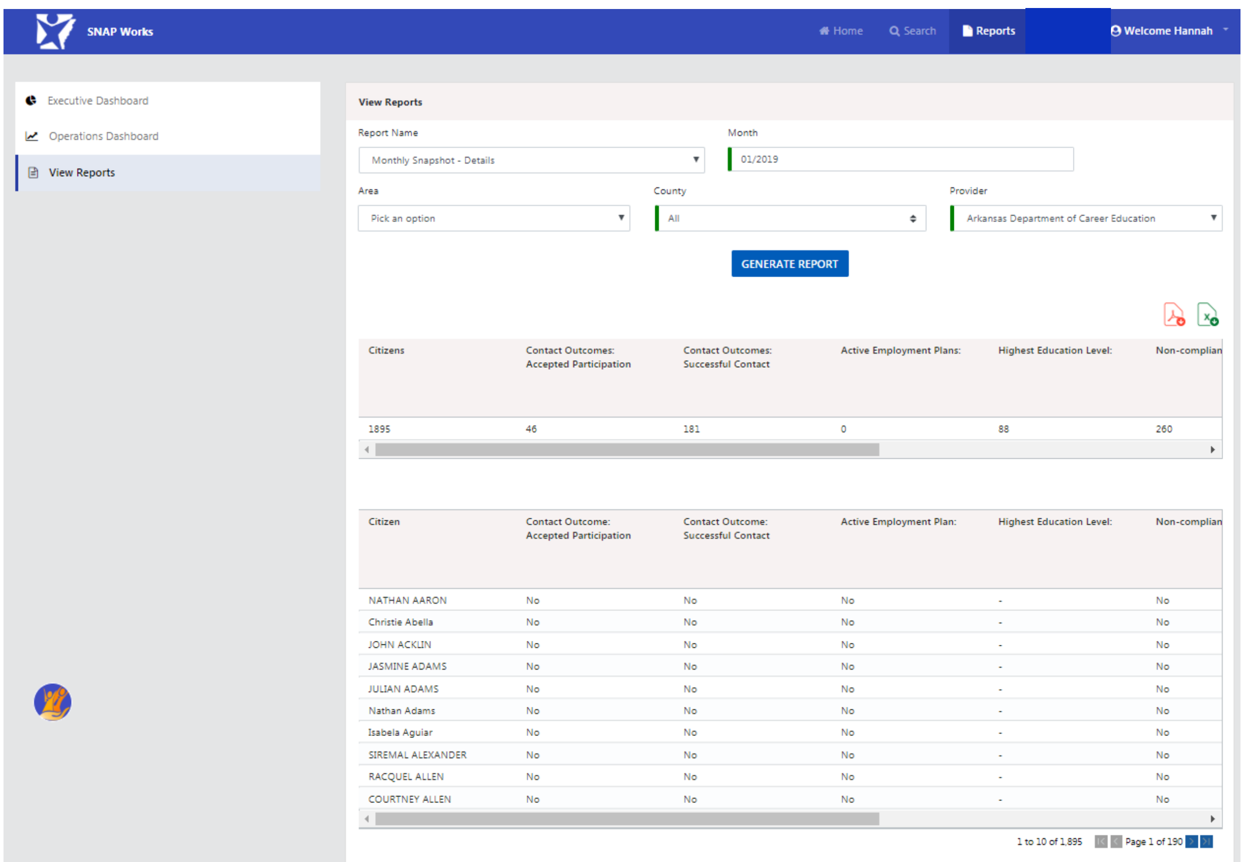
The Monthly Snapshot - Details Report will allow the user to see SNAP Works case information by client within a specified referral date month. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

New Feature: Monthly Snapshot - Details Report

44.2 Screenshot

Below is a screenshot of the Monthly Snapshot - Details Report.



44.3 Controls

The following table details the controls that are present on the Monthly Snapshot – Details Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Educational Gains – Roll Up Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Educational Gains – Roll Up Report display to an Excel document	Always enabled
Monthly Snapshot – Details Table	Displays a list of records based on the filters selected	Display only
Citizens	Displays the name of the client	Display only
Contact Outcomes: Accepted Participation	Displays whether or not the Citizen has a Contact Outcome of 'Accepted Participation' in the SNAP Works system	Display only
Contact Outcomes: Successful Contact	Displays whether or not the Citizen has a Contact Outcome of 'Successful Contact' in the SNAP Works system	Display only
Active Employment Plan	Displays whether or not the Citizen has an Active Employment Plan in the SNAP Works system	Display only
Highest Education Level	Displays the Citizen's highest education level achieved	Display only
Non-compliances	Displays whether or not the Citizen has Non-Compliance records in the SNAP Works system	Display only
Good Causes or Exemptions	Displays whether or not the Citizen has one or more granted Good Cause or Exemptions in the SNAP Works system	Display only
Certifications Earned	Displays whether or not the Citizen has one or more Certifications recorded the SNAP Works system	Display only
Case Closure: Subsidized/ Unsubsidized Employment	Displays whether or not the Citizen has a closed case with the Case Closure reason of 'Subsidized Employment' or 'Unsubsidized Employment' in the SNAP Works system	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally Enabled

44.4 User Actions

The following table details the actions that the user can take on the Educational Gains Report. Each action includes a description.

User Action	Description

Running the report	Click the value ***Monthly Snapshot – Details*** from the Report Name dropdown list. Once the page loads, enter the Month and select a County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.

45 Monthly Snapshot – Rollup Report

45.1 Overview

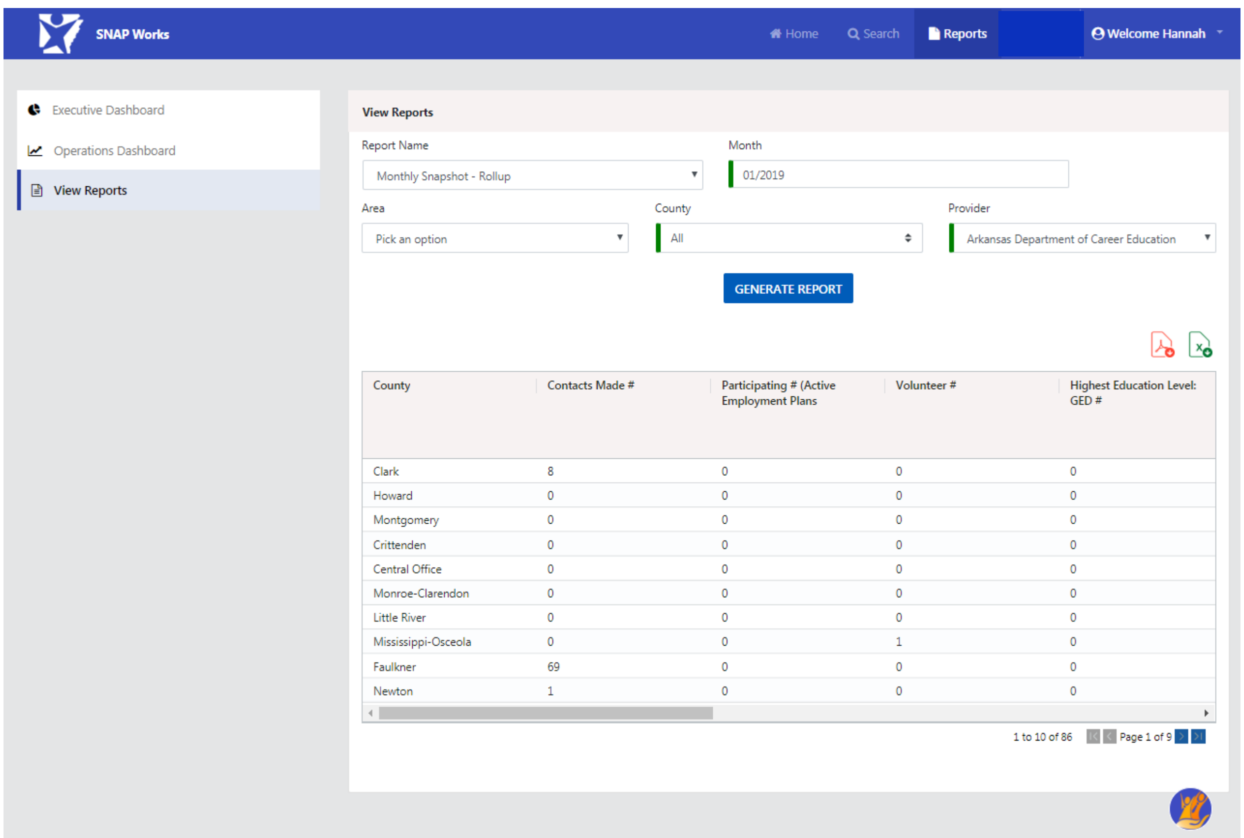
The Monthly Snapshot – Roll Up Report will allow the user to see snapshot statistics for each county within a specified month. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

New Feature: Monthly Snapshot - Rollup Report

45.2 Screenshot

Below is a screenshot of the Monthly Snapshot – Roll Up Report.



45.3 Controls

The following table details the controls that are present on the Monthly Snapshot - Rollup Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Educational Gains – Roll Up Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Educational Gains – Roll Up Report display to an Excel document	Always enabled
Monthly Snapshot – Rollup table	Displays a list of records based on the filters selected.	Display only
County	Displays the name of each county	Display only
Contacts Made #	Displays the distinct count of each client with a 'Accepted Participation' and 'Successful Contact' response from all Providers' Contact Histories in each county regardless of the month in which the contact was made	Display only
Participating # (Active Employment Plans)	Displays the distinct count of all Citizens who have an active employment plan in SNAP Works in each county	Display only
Volunteer #	Displays the distinct number of Volunteer participants in the E&T program in each county	Display only
Highest Education Level: GED #	Displays the distinct count of clients with GED as their Highest Education Level in each county	Display only
Highest Education Level: Highschool #	Displays the distinct count of clients with Highschool Graduate as their Highest Education Level in each county	Display only
Highest Education Level: Associates #	Displays the distinct count of clients with Associates as their Highest Education Level in each county	Display only
Highest Education Level: Bachelors #	Displays the distinct count of clients with Bachelors as their Highest Education Level in each county	Display only
Non compliance	Displays the distinct count of citizens with non-compliance records with a 'No' answer for the 'Is Good Cause being requested?' field and/or denied Good Cause requests in each county	Display only
Good Cause or Exemption	Displays the distinct count of citizens with granted Good Cause or Exemption requests in each county	Display only
Certifications Earned	Displays the distinct count of citizens who earned certifications in each county	Display only
Employed # (Case Closure: Subsidized/ Unsubsidized Employment)	Displays the distinct count of all citizens with case closures due to Subsidized or Unsubsidized Employment in each county	Display only

Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally Enabled

45.4 User Actions

The following table details the actions that the user can take on the Monthly Snapshot – Rollup Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Monthly Snapshot – Rollup Report*** from the Report Name dropdown list. Once the page loads, enter the Month, County, Provider or Area. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF or Excel for printing. ***NOTE****:* Based on the user's role, one or more of the fields may not display.

46 Component Activity Report

46.1 Overview

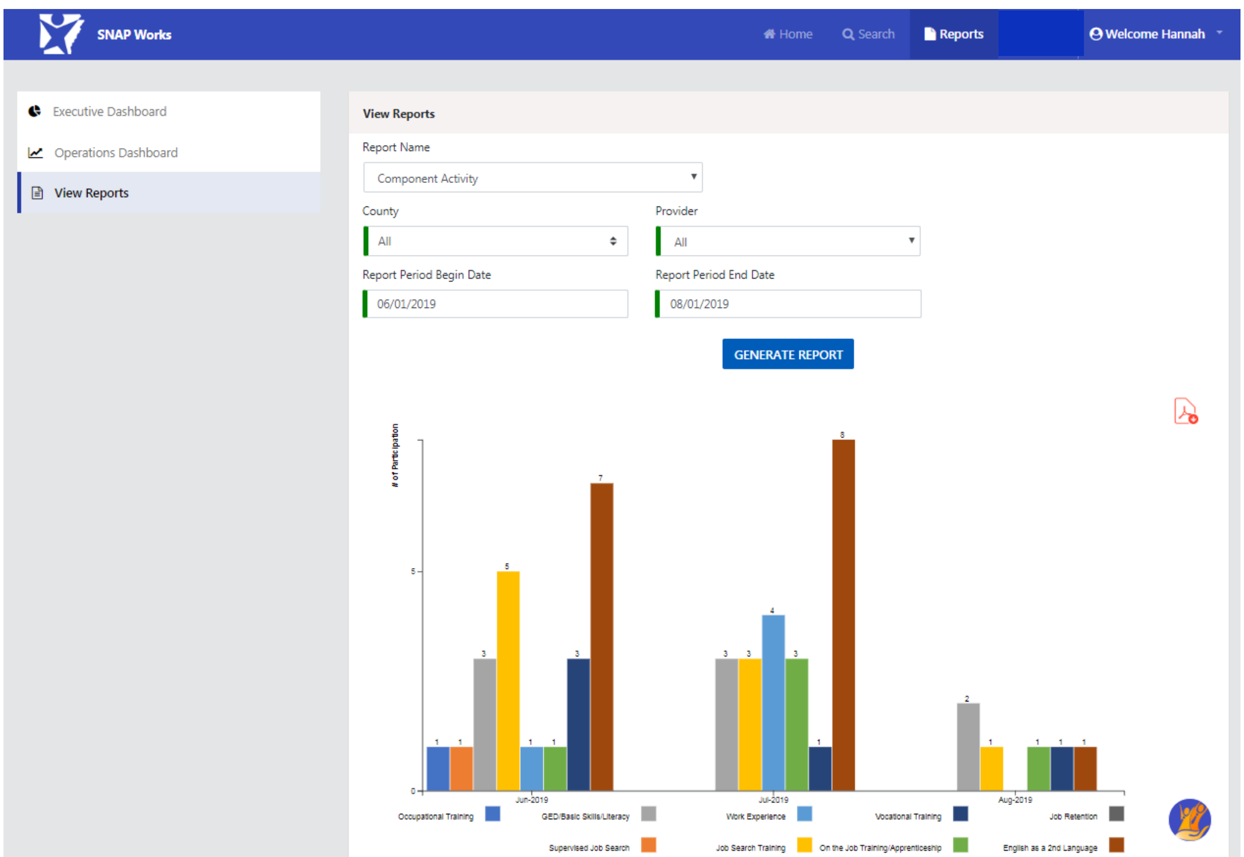
The Component Activity Report will allow the user to see the count of Citizens enrolled in each Component over a time range. The user will be able to export the report to a PDF document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user's location.

New Feature: Component Activity Report

46.2 Screenshot

Below is a screenshot of the Component Activity Report.



46.3 Controls

The following table details the controls that are present on the Educational Gains Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Educational Gains – Roll Up Report display to a PDF document	Always enabled
Component Activity Chart	Bar chart. Displays the count of clients enrolled in each component for the selected date range, County, and Provider. ***NOTE***: *The selected date range cannot exceed a 3 month time period.*	Display only

46.4 User Actions

The following table details the actions that the user can take on the Component Activity Report. Each action includes a description.

User Action	Description
Running the report	Click the value ***Component Activity*** from the Report Name dropdown list. Once the page loads, select a County, Provider and enter the time frame. Click the **Generate Report** button to run the report. Once the report runs, the user will be able to export the report to PDF printing. ***NOTE****:* Based on the user’s role, one or more of the fields may not display.

47 Potential Candidates Report

47.1 Overview

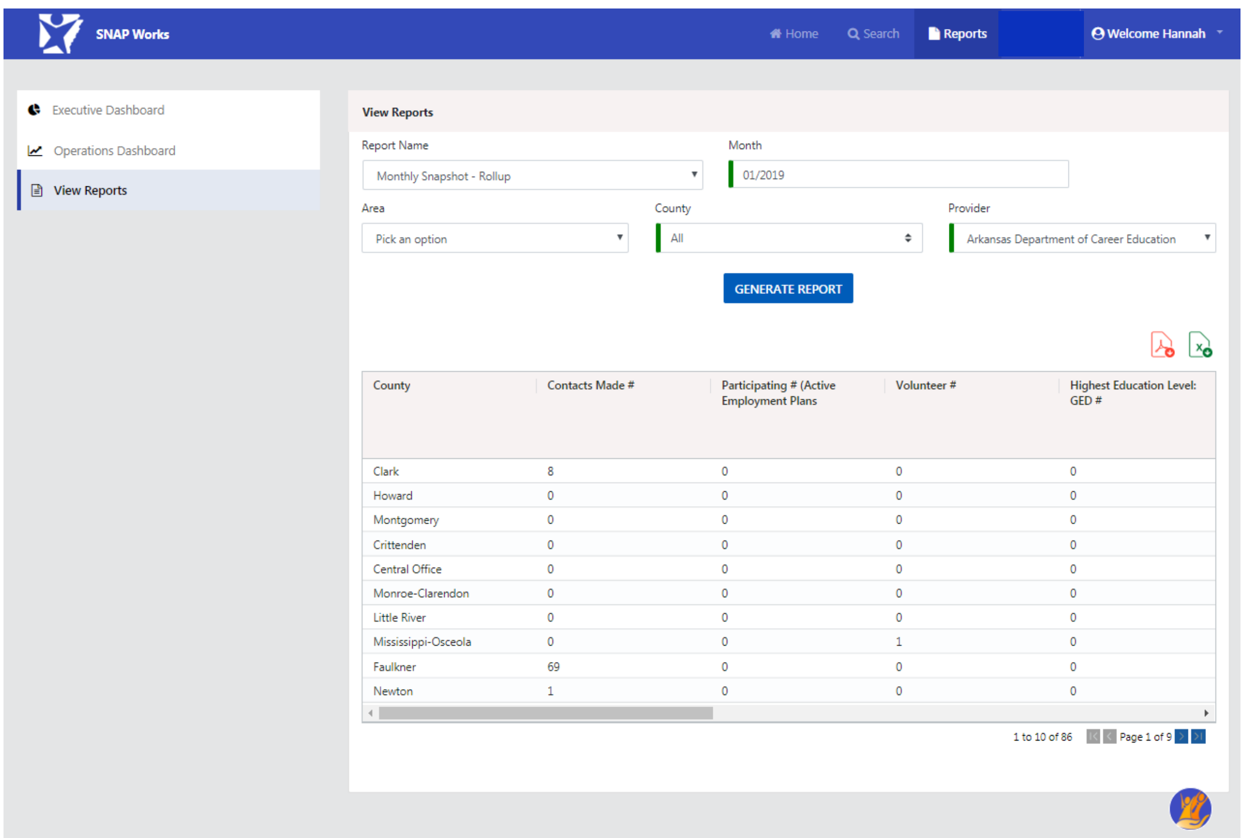
The Potential Candidates Report will allow the user to see a list of Arkansas citizens who have not been enrolled in SNAP Works yet but are eligible. The user can contact citizens shown in the list to potentially enroll them in the program. The user will be able to export the report to a PDF or Excel document for printing.

All users will have access to view this dashboard. Access to the data within the dashboard will be based on the user’s location.

New Feature: Potential Candidates Report

47.2 Screenshot

Below is a screenshot of the Potential Candidates Report.



47.3 Controls

The following table details the controls that are present on the Potential Candidates Report. Each control includes a description and control type.

Controls	Description	Control Type
Export (PDF)	Click the icon to export the Monthly Snapshot – Roll Up Report display to a PDF document	Always enabled
Export (Excel)	Click the icon to export the Monthly Snapshot – Roll Up Report display to an Excel document	Always enabled
Potential Candidates table	Displays a list of records based on the filters selected.	Display only
SSN	Displays the name of each county	Display only
First Name	Displays the distinct count of each client with a 'Accepted Participation' and 'Successful Contact' response from all Providers' Contact Histories in each county regardless of the month in which the contact was made	Display only
Last Name	Displays the distinct count of all Citizens who have an active employment plan in SNAP Works in each county	Display only
Residential Address	Displays the distinct number of Volunteer participants in the E&T program in each county	Display only
Residential Address Line 2	Displays the distinct count of clients with GED as their Highest Education Level in each county	Display only
City	Displays the distinct count of clients with Highschool Graduate as their Highest Education Level in each county	Display only
State	Displays the distinct count of clients with Associates as their Highest Education Level in each county	Display only
ZIP	Displays the distinct count of clients with Bachelors as their Highest Education Level in each county	Display only
Residential Phone	Displays the distinct count of clients with non-compliance records with a 'No' answer for the 'Is Good Cause being requested?' field and/or denied Good Cause requests in each county	Display only
Pagination Control	Allows the user to page through the results when there are more than 10 records present	Conditionally Enabled

47.4 User Actions

The following table details the actions that the user can take on the Monthly Snapshot – Rollup Report. Each action includes a description.

User Action	Description
Running the report	Click the value **Potential Candidates** from the Report Name dropdown list. Once the page loads, select an Area, County, Provider, Work Participation type, and enter the age range. Click the **Generate Report** button to run the report.

Once the report runs, the user will be able to export the report to PDF or Excel for printing.

NOTE: **Based on the user's role, one or more of the fields may not display.**

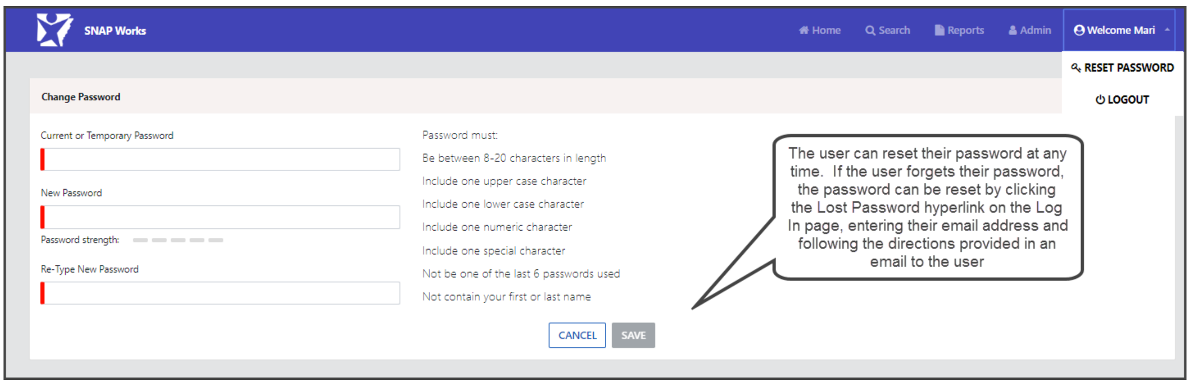
48 Reset Password Page

48.1 Overview

The Reset Password page allows the user to reset their password. The user will be able to reset their password at any time while logged into their account. Additionally, in the event that the user forgot their password, they will be able to create a new password.

48.2 Screenshot

Below is a screenshot of the Reset Password page.



48.3 Controls

The following table details the controls that are present on the Reset Password Page. Each control includes a description and control type.

Controls	Description	Control Type
Current or Temporary Password	Text box. Allows the user to enter their previous password or a temporary password. Required ***NOTE***: A temporary password will be entered in the following instances: • Creating a password to access the ***SNAP Works*** application for the first time • Creating a password when the user has forgotten their password	Always enabled
New Password	Text box. Allows the user to enter a new password to be able to access the ***SNAP Works*** application. Required	Always enabled
Re-Type New Password	Text box. The user will re-enter the New Password values to validate that the password intended is the password entered. Required	Always enabled

	NOTE: If the New Password and Re-Type New Password values do not match, the user will receive a warning notification	
Cancel	Button. Allows the user to cancel the transaction, terminating the request to change the password	N/A
Save	Button. Validates if minimum required fields have been completed. If valid, a task is sent to the intended user or user group. If invalid data exists, toast notifications will display to notify the user of the missing or invalid information.	N/A

48.4 User Actions

The following table details the actions that the user can take on the Reset Password Page. Each action includes a description.

User Action	Description
Navigation	Select the user's Welcome "Name", dropdown list in the Global Menu. Click **Reset Password** to access the page.
Completing the Password Reset Page when accessing from the Lost Password link	Enter the Temporary Password provided from the email that was generated when the user completed the Forgot Password page. Create a new password that meets the requirements displayed on the page in the New Password text box. Re-enter the new password in the Re-Type New Password text box. Click the **Save** button. Upon successful save, the page will close and return the user to the log in page. The user will be required to log in with the new password.
Completing the Password Reset Page when logged in	Enter the password used to access the ***SNAP Works*** application. Create a new password that meets the requirements displayed on the page in the New Password text box. Re-enter the new password in the Re-Type New Password text box. Click the **Save** button. Upon successful save, the page will close and return the user to the log in page. The user will be required to log in with the new password.

49 Chatbot

49.1 Overview

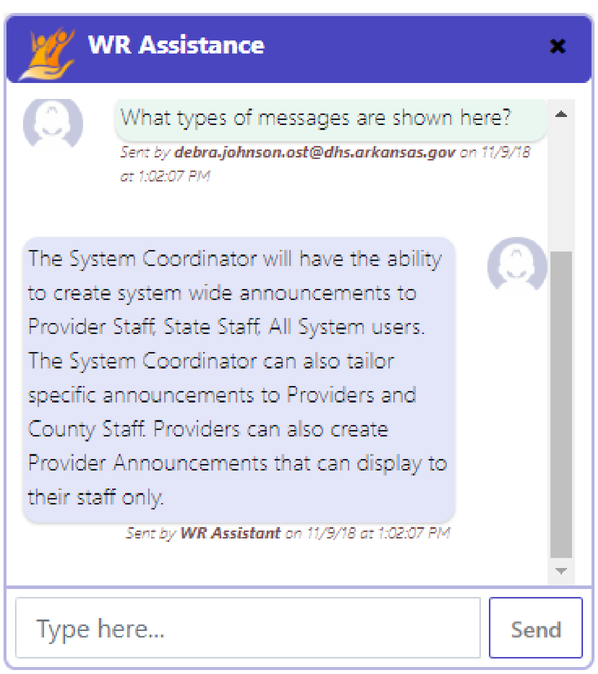
The Chatbot is a messaging application that allows the user to enter frequently asked questions, related to the ***SNAP Works*** application. If the Chatbot does not have an answer that matches the question asked, it will send a corresponding response that it doesn't understand.

> ***Note:*** *To help make the Chatbot more intuitive, please contact a System Administrator with questions that should be added to this messaging application.*

The Provider and System Coordinator will be able to create these records; all other users will have read access only.

49.2 Screenshot

Below is a screenshot of the Chatbot icon and the WR Assistance wiki that opens when the user selects the icon.



49.3 Controls

The following table details the controls that are present on every page of the ***SNAP Works*** application as it relates to the Chatbot application. Each control includes a description and control type.

Controls	Description	Control Type
Chatbot	Button that opens the WR Assistance application	Always enabled
Type Here	Text box that allows the user to enter a question related to the	Conditionally enabled
Response	Text box that displays the answer to a User's question	Conditionally enabled
Send	Button that initiates a response when the user enters a question in the Type Here text box	Conditionally enabled

49.4 User Actions

The following table details the actions that the user can take on every page of the ***SNAP Works*** application as it relates to the Chatbot application. Each action includes a description.

User Action	Description
Navigation	On any page within the ***SNAP Works*** application, click the **WR Assistant** icon to open the WR Assistant Chatbot.
Completing an assistance request	In the "Type here" text box, enter the assistance question and click the **Send** button. The system will return a response based on the question asked in the chat box above the "Type Here" text box.

50 View Tasks

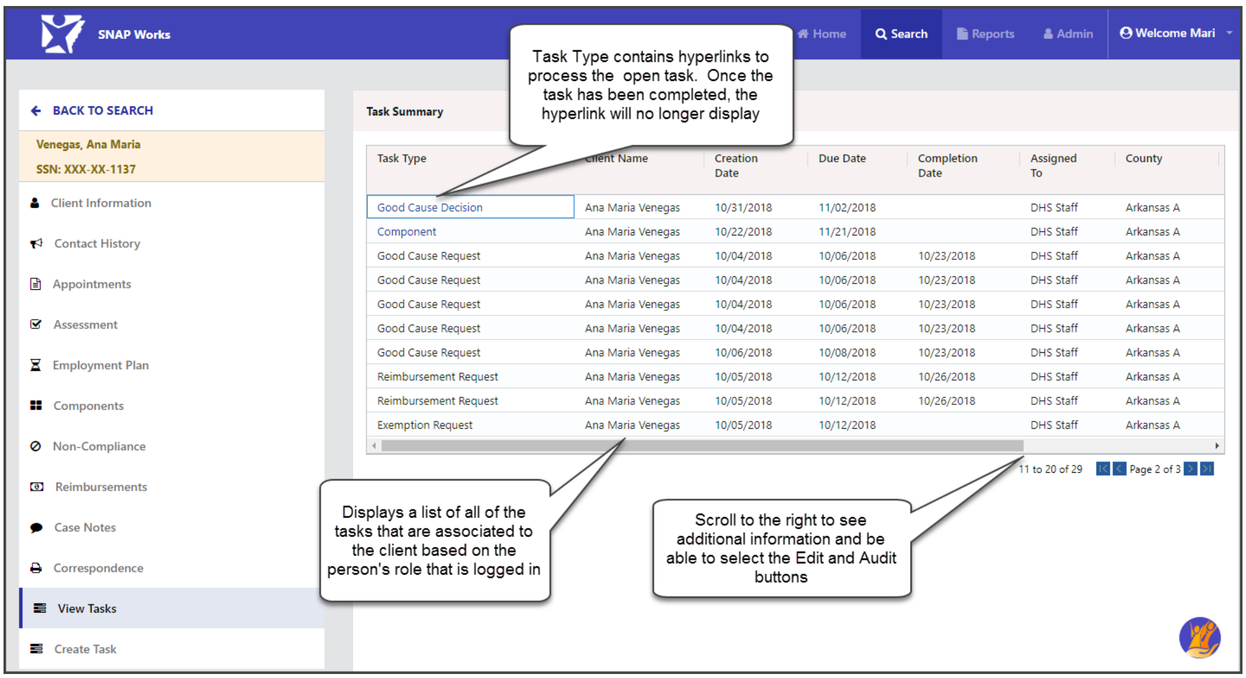
50.1 Overview

The View Tasks page comprises a list of all of the tasks that have been created regarding the specified client. Based on the user's role, the list will only display those records that are pertinent to that user.

All users will be able to edit and view these records.

50.2 Screenshot

Below is a screenshot of View Tasks page.



50.3 Controls

The following table details the controls that are present on the View Tasks Page. Each control includes a description and control type.

Controls	Description	Control Type
Task Summary Grid	The grid displays a list of all tasks that have been associated to the client.	Display only
Task Type	Hyperlink that directs the user to a specific location to process the task. Refer to Appendix A: Task Matrix for more information.	Conditionally enabled

	NOTE: Tasks that have been completed will not contain a hyperlink.	
Client Name	Displays the name of the Client	Display only
Creation Date	Displays the date the Task was created	Display only
Due Date	Displays the date that Task was due to be completed by. ***NOTE:*** Refer to Appendix A: Task Matrix for more information regarding the due date.	Display only
Completion Date	Displays the date that the Task was completed. If the task is still open, a date will not display	Display only
Assigned To	Displays the Provider or County the Task is assigned to. ***NOTE**:* Providers will not be able to view DHS Staff tasks and DHS Staff cannot view Provider tasks	Display only
County	Displays the client's service county	Display only
Task Status	Displays the current status of the task	Display only
Overdue	Icon that indicates the task record has not been processed and is past the due date assigned to the task	Display only
	Edit button, identified as a "pencil"	Conditionally enabled
	Audit button, identified as a "clock" that redirects the user to the audit page	Conditionally enabled
Pagination control	Allows the user to page through the results when there are more than 10 records present	Conditionally enabled

50.4 User Actions

The following table details the actions that the user can take on every page of the ***SNAP Works*** application as it relates to the Chatbot application. Each action includes a description.

User Action	Description
Navigation	To navigate to the Create Task page, the user can access the client record by any of the following methods: • Search for a task and click the Task Type, such as *Referral, Appointment* and then click the **View Tasks** hyperlink in the left navigation menu. • Search for a Client and select the client record from the dropdown list. When the grid loads, click the click the **View Tasks** hyperlink in the left navigation menu.

51 Appendix A: Task Matrix

The below task matrix outlines the type of tasks that are in the ***AR Works*** application. This matrix includes actions that initiate a task and procedure process to close the task. This matrix addresses Tasks as they relate to both DHS Staff and Providers.

New Feature: Task Labels
Actionable: Tasks requiring an action
Informational: Tasks simply providing information

Task Name	Landing Page	Due Days	Task For	Automatic /Manual	Creation of Task	Closure of Task	Possible Action
Referral (Actionable)	Contact History	5	Provider	Automatic	Referral Tasks will automatically come in from ***ANSWER*** based on the Work Participation Characteristics and General Characteristics.	Referral Tasks will be automatically closed when an appointment is scheduled. Alternatively, Referral Tasks should be able to be manually closed if an appointment cannot be scheduled due to no contact.	1a. Schedule Appointment 1b. If the provider is unable to contact the client (i.e. no answer to phone and returned Appointment Notices), then record attempts in Contact History.
Appointment (Actionable)	Appointment	5	Provider	Automatic	The Appointment Task will automatically be created when a provider schedules an appointment.	Appointment Tasks will automatically be closed when the appointment is marked as 'No show', Re-schedule', or 'Show'	1. Mark Appointment as 'No show', 'Re-schedule', or 'Show' 2a. If client shows, conduct appointment. 2b. If client does not show and has less than 3 occurrences of Non-Compliance, make a Case Note. 2c. If client does not show and has at least 3 occurrences of Non-Compliance, complete

							Non-Compliance. 2d. If client does not show, the provider can reschedule the appointment at their discretion, marking the appointment as 'Re-schedule'
Perform Assessment (Actionable)	Assessment	30	Provider	Automatic	The Assessment Task will automatically be created when an appointment is marked as 'Show'.	The Assessment Task will automatically close when the Assessment is finalized. Alternatively, Assessment Tasks can be manually closed if an assessment cannot be finalized due to non-compliance.	1a. Conduct and finalize Assessment 1b. If client does not cooperate in conducting the Assessment and has less than 3 occurrences of Non-Compliance, make a Case Note. 1c. If client does not cooperate in conducting the Assessment and has at least 3 occurrences of Non-Compliance, complete Non-Compliance. 1d. If client/provider needs to leave in the middle of the Assessment, schedule another appointment at provider's discretion to resume the Assessment at a later time.
Employment Plan (Actionable)	Employment Plan	30	Provider	Automatic	The Employment Plan Task will be automatically created when an Assessment is finalized.	The Employment Plan Task will be closed when an Employment Plan is created. Alternatively, Employment Plan Tasks	1a. Create an Employment Plan 1b. If client does not cooperate in creation of an Employment Plan and has less than 3 occurrences of Non-

						can be manually closed if an Employment Plan cannot be created due to non-compliance.	Compliance, make a Case Note. 1c. If client does not cooperate in creation of an Employment Plan and has at least 3 occurrences of Non-Compliance, complete Non-Compliance. 1d. If client/provider needs to leave in the middle of the Employment Plan, schedule another appointment at provider's discretion to create the Employment Plan at a later time.
Component (Actionable)	Component Summary	30	Provider	Automatic	The Components Task will be automatically created when an Employment Plan is created.	The Components Task will close when at least one component, linked to the active Employment Plan, is created.	1a. Create at least one Component 1b. If client does not cooperate in creation of Components and has less than 3 occurrences of Non-Compliance, make a Case Note. 1c. If client does not cooperate in creation of an Components and has at least 3 occurrences of Non-Compliance, complete Non-Compliance. 1d. If client/provider needs to leave in the middle of the creation of Components, schedule another appointment at provider's discretion to create the Components at a later time.

Monthly Track Component (Actionable)	Track Component	10	Provider	Automatic	The Monthly Track Components Task will be automatically created on the 1st of every month if there are a Component was ever active during the previous month.	The Monthly Track Components Task will be closed when all hours and 'Met Plan?' are entered for all components of the previous month. Alternatively, if the hours were entered before the creation of the Monthly Track Components Task, then the task should not be created.	1. Enter Hours and 'Met Plan?' for all components of the previous month
Reimbursement							
Reimbursement Request (Actionable)	Reimbursements	7	System Coordinators ('Central Office')	Automatic	The Reimbursement Request Task will be automatically created when the Reimbursement Request is completed and saved on the Reimbursements page.	The Reimbursement Request Task will be automatically closed when a Reimbursement Decision is completed.	1. A Reimbursement Request is completed and will require completion of a Reimbursement Decision.
Reimbursement Decision (Informational)	Reimbursement	7	System Coordinator or Provider	Automatic	The Reimbursement Decision Task is a notification of a Reimbursement Decision. This task will be automatically created when a Reimbursement Decision is completed. The closure of the Reimbursement Request Task and opening of the Reimbursement Decision Task will be simultaneous.	Because the Reimbursement Decision Task is a notification of a Reimbursement Decision, this task will require manual closure.	1. A Reimbursement Decision is completed and will send notification of a Reimbursement Decision.
Reimbursement Decision	My Alerts	N/A	Citizen	Automatic	The 'Reimbursement Decision' Alert will be automatically created when the System Coordinator approves	The 'Reimbursement Decision' Alert will automatically be removed when the Citizen clicks	1. Acknowledge Reimbursement Alert 2. Contact Provider

					or denies reimbursement. An automated email will be sent to the Citizen notifying them of the alert. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	'Acknowledge' on the View Alerts page.	
Non-Compliance							
Non-Compliance (Actionable)	Non-Compliance	2	County Worker	Automatic	The Non-Compliance Task will be automatically created when Non-Compliance is completed by the provider.	The Non-Compliance Task will be automatically closed when a Non-Compliance Decision is completed.	1. Review Non-Compliance and grant Non-Compliance decision 2. Make any updates in the ***ANSWER*** system for Non-Compliance
Non-Compliance Decision (Informational)	Edit Task	2	Provider	Automatic	The Non-Compliance Decision Task is a notification of a Non-Compliance Decision. This task will be automatically created when a Non-Compliance Decision is completed. The closure of the Non-Compliance Task and opening of the Non-Compliance Decision Task will be simultaneous.	The Non-Compliance Decision Task will be automatically closed if the case is closed on the Enrollment Summary page with a Closure Reason of 'Non-Cooperation Sanction'. Alternatively, the Non-Compliance Decision Task can be closed manually if a Non-Cooperation Sanction is not applicable.	1. Case closes on Non-Cooperation Sanction (Enrollment Summary and Employment Plan updated as such) 2. No action happens if Caseworker does not agree with Non-Compliance
Exemption							

Exemption Request (Actionable)	Edit Task	7	County	Manual	The Exemption Request will be manually created by a provider when a provider believes that the client should be exempt from the ***SNAP Works*** program.	The Exemption Request Task will be manually closed by a county worker after making any updates in ***ANSWER*** or updates to the Case Notes.	1a. Decide that the client should be exempt and change their coding in ***ANSWER***. 1b. Decide that the client should not be exempt and enter Case Notes.
Client No Longer RTW (Actionable)	Employment Plan Summary	5	Provider	Manual	The Client No Longer RTW Task will be manually created by a County Worker if the client is determined to be exempt from ***SNAP Works***.	The Client No Longer RTW Task will be automatically closed when the case is closed on the Enrollment Page with a Closure Reason of 'Client no longer eligible for ***SNAP Works***'	1. Provider must take appropriate action: Change Enrollment Summary and Employment Plan Status to closed with a Closure Reason of 'Client no longer eligible for ***SNAP Works***'
Citizen Exemption Request (Actionable)	Non-Compliance Details	7	County Worker	Automatic	The 'Citizen Exemption Request' Task will automatically be created when a Citizen requests Exemption through the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Exemption Request' Task will be automatically closed when an Exemption Decision is completed by the 'Good Cause/Exemption Authorized' field being populated and save on the Non Compliance / Exemption page by the County Worker.	1a. Decide that the client should be exempt and change their coding in ANSWER. 1b. Decide that the client should not be exempt and enter Case Notes. 2. Enter 'Granted' or 'Denied' on the Non Compliance / Exemption screen.
Exemption Decision	Alerts	N/A	Citizen	Automatic	The 'Exemption Decision' Informational Alert will be automatically created when the County Worker grants or denies the	The 'Exemption' Alert will automatically be removed when the Citizen clicks 'Acknowledge' on the My Alerts page.	1. View Exemption Granted/Denied 2. Do Not View Exemption Granted/Denied

					Exemption. Invocation: Upon click of the Save button, the system will validate if the Exemption originated from the Citizen Portal and if the Good Cause/Exemption Authorized field is populated with the values 'Granted' or 'Denied.'		
Exemption Request (Actionable)	Non-Compliance Details	7	County Worker	Automatic	The 'Exemption Request' Task will be automatically created when the Provider enters a record on the Non-Compliance page with a Non-Compliance reason that is specific to exemption. ***This is an existing task but is being updated to be created automatically.*** Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated and will validate that the Non-Compliance reason is classified as an Exemption reason. If yes, the task will be created. If not, nothing.	The Exemption Request Task will be automatically closed by a county worker after making any updates in ANSWER or updates to the Case Notes.	1a. Decide that the client should be exempt and change their coding in ANSWER. 1b. Decide that the client should not be exempt and enter Case Notes. 2. Enter 'Granted' or 'Denied' on the Non Compliance / Exemption screen.

Good Cause

Good Cause Request (Actionable)	Non-Compliance	2	County Worker	Automatic	The Good Cause Request Task will be automatically created when Non-Compliance is completed with Good Cause requested by the provider.	The Good Cause Request Task will be automatically closed when a Good Cause Decision is completed.	1. Review Non-Compliance and Good Cause and grant Good Cause decision
Good Cause Decision (Informational)	Non-Compliance	2	Provider and System Coordinator	Automatic	The Good Cause Decision Task is a notification of a Good Cause Decision. This task will be automatically created when a Good Cause Decision is completed. The closure of the Good Cause Request Task and opening of the Good Cause Decision Task will be simultaneous.	The Good Cause Decision Task will be manually closed as this is a notification of the Good Cause Decision.	1. The Good Cause Decision will update the Non-Compliance page and the Components Overall Progress for the Non-Compliance month.
Citizen Good Cause Request (Actionable)	Non-Compliance Details	2	County Worker	Automatic	The 'Citizen Good Cause Request' Task will be automatically created when the Citizen requests Good Cause from the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Good Cause Request' Task will be automatically closed when a Good Cause Decision is completed by the 'Good Cause/Exemption Authorized' field being populated and save on the Non Compliance / Exemption page by the County Worker.	1. Review Good Cause and grant or deny Good Cause

Citizen Good Cause Requested (Informational)	Non-Compliance Details	5	Provider	Automatic	The 'Citizen Good Cause Requested" Task will be automatically created when the Citizen requests Good Cause from the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Good Cause Requested' Task will be automatically closed when a Good Cause Decision is completed. 'The 'Citizen Good Cause Requested' Task can also be manually closed after the informative task is reviewed.	1. Review informative task
Citizen Good Cause Decision (Informational)	Non-Compliance Details	5	Provider	Automatic	The 'Citizen Good Cause Decision' Task will be automatically created when the County Worker denies or approves Good Cause requested by the Citizen from the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Good Cause Decision' Task will be manually closed after the informative task is reviewed.	1. Review informative task

Good Cause Decision	Non-Compliance Details	N/A	Citizen	Automatic	The 'Good Cause Decision' Informational Alert will be automatically created when the County Worker grants or denies the Good Cause Request. Invocation: Upon click of the Save button, the system will validate if the Good Cause Request originated from the Citizen Portal and if the Good Cause/Exemption Authorized field is populated with the values 'Granted' or 'Denied.'	The 'Good Cause' Alert will automatically be removed when the Citizen clicks 'Go To' on the View Alerts page.	1. View Good Cause Granted/Denied 2. Do Not View Good Cause Granted/Denied
Components/Comparable Workfare							
Citizen Hours Approval (Actionable)	Track Component	5	Provider	Automatic	The 'Citizen Hours Approval' Task will be automatically created when a Citizen self-reports component hours through the Citizen Portal. Invocation: Upon click of the Finalize Hours button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Hours Approval' Task will be automatically closed when the 'Track Component' page is accessed, the 'Reported hours' are viewed, and the 'Completed hours' and 'Met Plan?' fields are populated and saved for the respective component record. If the 'Completed hours' and 'Met Plans?' fields are populated prior to the 'Citizen Hours Approval' Task creation, then the 'Citizen Hours Approval' Task creation will	1. Review 'Reported hours' 2. Enter 'Completed hours' and 'Met Plan?' fields if not already done

						automatically close when the 'Track Component' page is accessed. Alternatively, if the 'Completed hours' and 'Met Plans?' fields are populated prior to the 'Citizen Hours Approval' Task creation and the 'Track Component' page is not accessed, then the task can be manually closed by the Provider.	
Citizen Comparable Workfare Approval (Actionable)	Edit Task	5	County Worker	Automatic	The 'Citizen Comparable Workfare' Task will be automatically created when a Citizen self-reports Comparable Workfare through the Citizen Portal. Invocation: Upon click of the Finalize Hours button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Comparable Workfare Approval' Task will be automatically closed when the 'Comparable Workfare' page is accessed, the 'Reported hours' are viewed, and the 'Verified hours' field is populated and saved for the respective Comparable Workfare record. If the 'Verified hours' field is populated prior to the 'Citizen Comparable Workfare Approval' Task creation and the 'Comparable Workfare' page is not accessed, then the task can be manually closed by the County Worker.	1. Review 'Reported hours' 2. Enter 'Verified hours' field if not already done
Hours Denied	Alerts	N/A	Citizen	Automatic	The 'Hours Denied' Informational Alert will be automatically created when the Provider has entered Verified Hours that are less than the	The 'Hours Denied' Alert will automatically be removed when the Citizen views the alert on the Alerts page.	1. View Verified Hours 2. Do not view Verified Hours

					Citizen's Reported Hours for a Component or the County Worker has entered Verified Hours that are less than the Citizen's Reported Hours for Comparable Workfare. Invocation: Upon click of the Save button on the Track Components or Comparable Workfare page, the system will validate if Verified hours that are less than the Reported hours. If yes, the alert will be created. If no, nothing.		
Other							
Reverse Referral (Actionable)	Edit Task	2	County	Manual	The Reverse Referral Task will be manually created by a provider when a SNAP recipient volunteers to be part of the ***SNAP Works*** program.	The Reverse Referral Task will be manually closed by a County Worker after making updates in ***ANSWER***.	1. ***ANSWER*** Coding updated to create referral
Case Closure (Actionable)	Employment Plan	10	Provider	Manual & Automatic	The Case Closure Task will be manually created by a County Worker when the SNAP Case closes in ***ANSWER***.	The Case Closure Task will be automatically closed when the case is closed on the Enrollment Summary page with a Closure Reason of 'SNAP Case Closed'.	1. Close the Enrollment Summary and Employment Plan with a closure reason of 'Case Closed'

Employment Plan Annual Review (Actionable)	Employment Plan	*10 days from the end of the year based on the client's latest, active Referral Date (Referral Date + 1 year - 10 days)	Provider	Automatic	The Employment Plan Annual Review Task will be automatically created 10 days from the end of the year* if there is an 'Active' Employment Plan.	The Employment Plan Annual Review Task will be manually closed after the Provider reviews the Employment Plan.	1. Review the Active Employment Plan
Provider Reassignment (Actionable)	Client Information - Enrollment Summary	2	System Coordinator	Manual	The Provider Reassignment Task will be manually created by the Provider.	The Provider Reassignment Task will be automatically closed when the Assigned Provider is changed on the Enrollment Summary page of Client Information.	The Assigned Provider field on the Client Information - Client Summary will be updated by the System Coordinator. This field should only be enabled for the System Coordinator.
Client Dropped from SNAP Case (Actionable)	Employment Plan Summary	10	Provider	Manual	The Client Dropped from SNAP Case Task will be manually created by a County Worker when the client is dropped from a SNAP Case in ***ANSWER***.	The Case Closure Task will be automatically closed when the case is closed on the Enrollment Summary page with a Closure Reason of 'SNAP Case Closed'.	1. Close the Enrollment Summary and Employment Plan with a closure reason of 'Case Closed'
Address Change (Actionable)	Edit Task	5	County	Manual	An Address Change Task will be manually created by a Provider.	The Address Change Task will be manually closed by the County Worker.	1. Review the Address Change and update ***ANSWER***.
Employment Change (Actionable)	Assessment - Work History	5	County	Automatic	An Employment Change Task will be automatically created when the Assessment - Work History is updated.	The Employment Change Task will be manually closed by the County Worker.	1. Review the Employment Change and update ***ANSWER***.

Contact Change (Actionable)	Client Information - Client Summary	5	County	Automatic	A Contact Change Task will be automatically created when the Client Information - Client Summary Additional Contact Details is updated.	The Contact Change Task will be manually closed by the County Worker.	1. Review the Contact Change and update ***ANSWER***.
Citizen Appointment Request (Actionable)	Edit Task	5	Provider	Automatic	The 'Citizen Appointment Request' Task will automatically be created when a Citizen makes an appointment request through the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Appointment Request' Task will automatically be created when a Citizen makes an appointment request through the Citizen Portal. Invocation: Upon click of the Save button, the system will validate if all mandatory fields are populated with valid values. If yes, the task will be created. If no, an error message will show.	The 'Citizen Appointment Request' Tasks should be able to be manually closed by the Provider.
Citizen Document Upload (Informational)	Corresponde nce	10	Provider	Automatic	The 'Citizen Document Upload' Task will automatically be created when a Citizen uploads a document through the Citizen Portal of one of the following specific Document Types: 1. Certifications 2. Test Scores 3. Reimbursement Information 4. Other	The 'Citizen Document Upload' Task will be manually closed by the Provider from the Edit Task screen.	1. Review uploaded documents 2. Delete uploaded documents if needed 3. Manually close the 'Citizen Document Upload' Task

					Employment Plan, Comparable Workfare, and Good Cause/Exemption Document Types will not create a task. Invocation: Upon click of the Upload button, the system will validate if the document is a document type that must be reviewed by the Provider. If yes, the task will be created. If no, nothing.		
New Notice Alert	My Alerts	N/A	Citizen	Automatic	The 'New Notice Alert' will automatically be created when a notice is generated by the Provider or System Coordinator via the Provider or Worker Portal respectively. Invocation: Upon click of the 'Print' button on the Provider or System Coordinator Correspondence page, the system will create a notice and send an alert to the Citizen Portal.	The 'New Notice Alert' will be closed upon click of the 'My Alerts' page.	1. View the notice 2. Do not view the notice

52 Appendix B: Role Security

The table below indicates the level of security that each DHS Staff user role has for each page within the ***SNAP Works*** application. A legend also displays to assist the user in understanding the table.

Screen Name	Roles
	Provider
Provider Log In Page	R,W
Provider Dashboard	R
DHS Staff Dashboard	X
Search Tasks	R,W
Search Clients	R,W
Search Reverse Referral	R,W
Client Summary	R,W
Household Summary	R
Eligibility Summary	R
Enrollment Summary	R
Create New Task	R,W
Edit Task	R,W
Task Audit	R
Case Notes	R
Add Case Note	R,W
Contact Details	R,W
Contact History	R
Password Reset	R,W
Forgot Password	R,W
Change Password	R,W
Schedule Appointment	R,W
Appointment History	R
Assessment Summary	R,W
Assessment Summary Audit	R
Education and Certification	R,W
Education and Certification Audit	R
Skills and Strengths	R,W
Skills and Strengths Audit	R
Tests and Scores	R,W
Tests and Scores Audit	R
Barriers	R,W
Barriers Audit	R
Work History	R,W
Work History Audit	R

Employment Plan Summary	R
Employment Plan Details	R,W
Employment Plan Audit	R
Print Employment Plan	R
Component Summary	R
Component Summary Audit	R
Component Details	R,W
Track Component	R,W
Track Component Audit	R
Overall Progress	R
Comparable Workfare	R
Non-Compliance Summary	R
Non-Compliance Details: Non-Compliance	R,W
Non-Compliance Details: Good Cause	X
Non-Compliance Audit	R
Reimbursement Summary	R
Reimbursement Details: Request	R,W
Reimbursement Details: Decision	R
Reimbursement Audit	R
Correspondence – Documents	R,W
Correspondence – Notices	R
Provider Announcement Summary	R
Provider Announcement Details	R,W
Admin Announcement Summary	X
Admin Announcement Details	X
Administration:	
Application Configuration Summary	X
Application Configuration Details	X
Access Control Summary	X
Access Control Details	X
Provider Summary	X
Provider Details	X
Assign Provider County	X
Assign Provider Office	X
Staff Management Summary	X
Staff Management Details	X
View Reports:	
Executive Dashboard	R
Operations Dashboard	R
Report Parameters	R,W
Component Progress - Rollup	R
Component Progress - Client Level	R
Educational Gains - Rollup	R
Employment & Training Retention	R
Monthly Snapshot – Details	R

Monthly Snapshot – Rollup	R
Component Activity	R
E&T Annual report	R
FNS 583	R

Legend:

Value	Refers To
R	Read
W	Write (Create and/or Edit)
X	No access

53 Appendix C: Requirement to Work Counting Formula

The table below illustrates how the Monthly Countable Hours are determined for each Component. For more information about Components, please refer to section 25 Component - Component Details Page.

RTW Hours Counting Formula

Component	Description	Qualifying?	Activity	Formula	Allowable Monthly Hrs
Independent Job Search	Independent Job Search	No	Less than 10 hours per week. Cannot be combined with Job Search Training to exceed the hours gap	3 weekly job contacts = 9 hrs RTW time	< 40 hrs
Job Search Training	Job Search Training	No	Less than 10 hours per week. Cannot be combined with Independent Job Search to exceed the hours gap	3 weekly job contacts = 9 hrs RTW time	< 40 hrs
Job Club	Job Club	No	Less than 10 hours per week. Cannot be combined with Independent Job Search to exceed the hours gap	3 weekly job contacts = 9 hrs RTW time	< 40 hrs
Employment Counseling	Employment Counseling	No	Less than 10 hours per week. Cannot be combined with Independent Job Search to exceed the hours gap	3 weekly job contacts = 9 hrs RTW time	< 40 hrs
Vocational Training	Credit bearing courses	Yes	Progress required	1 credit hr = 2.5 weekly clock hrs	80
Occupational Training	Certification courses, short or long, credit or non-credit	Yes	Progress towards certification	1 hour of instruction = 2 weekly clock hrs	80
GED	GED	Yes	Increase grade level	1 hour of instruction = 2 weekly clock hrs	80
Basic Skills	Basic Skills	Yes	Increase grade level	1 hour of instruction = 2 weekly clock hrs	80
Literacy	Literacy	Yes	Increase grade level	1 hour of instruction = 2 weekly clock hrs	80
English as a 2nd Language (ESL)	English as a 2nd Language (ESL)	Yes	Progress required	1 hour of instruction = 2.5 weekly clock hrs	80
On the Job Training	On the Job Training	Yes	Paid work	1 hr = 1 hr	80
Apprenticeship	Apprenticeship	Yes	Paid work	1 hr = 1 hr	80
Work Experience	Work Experience	Yes	Unpaid work at non-profit or public agency	1 hr = 1 hr	80

54 Appendix D: Chatbot Frequently Asked Questions

The following table describes some of the questions that may be asked via the Chatbot search icon. As more questions are directed to the System Coordinator, the additional questions will be added to the Chatbot.

Examples	Action
How do I view my appointments?	The Appointment History page shows all scheduled appointments for the client.
What types of tasks are shown?	Types of task shown are Referrals, Appointment, Address change, Telephone change, Employment Change, Client Now RTW, Client No Longer RTW, Client dropped from SNAP Case, SNAP Case Closed
How do I access my tasks?	The Task Search page allows to search open, in progress, and overdue tasks.
What types of messages are shown here?	The System Coordinator will have the ability to create system wide announcements to Provider Staff, State Staff, All System users. The System Coordinator can also tailor specific announcements to Providers and County Staff. Providers can also create Provider Announcements that can display to their staff only.
How do I access my messages?	The Announcements Page will show all announcements created by system users.
What does appointment statistics show?	The Appointment History page shows all scheduled appointments for the client and the status of the appointment.
What can I enter into the clients search bar?	Client search can be initiated by Name, DOB, SSN, or Client Id.
Can I search using my name to find my tasks?	No. The search criteria options are Tasks or Client.
Are any of the search fields mandatory?	There are no mandatory fields.
Can I sort the search results by due date?	Yes. Search results can be sorted by due date.

How do access a task from the search results?	Select the Task ID link and the system will redirect the user to the Task History Record.
What information is shown on Client Summary?	Information shown on Client Summary is Personal Information, Contact Details, and Additional Contact Details
What information is shown on Enrollment Summary?	Referral Date, Assessment Date, Employment Plan Start Date, Employment Plan Status, Assigned Provider Employment Plan Estimated Completion Date, Employment Plan End Date
What information is shown on Eligibility Summary?	Program Type, ABA Months, Certification Period Dates, Benefit Amount, Service County
What information is shown on Household Summary?	Name, Relationship, Gender, DOB Work Participation Status, Other Characteristics
How do I schedule an appointment?	Appointments are scheduled on the Appointments page.
What does appointment status mean?	Appointment status shows what stage the client's appointment process is in.
What is appointment history?	A history of all scheduled appointments for the client.
How do I edit an appointment?	By clicking on 'RESET' on the Appointment page.
What is the purpose of the assessment?	The purpose of the assessment is to evaluate the client to determine which component(s) best meet the client's needs for RTW requirements.
How do I access a client's assessment?	Assessments are completed on the Assessment Page.
How do I add a training for a client?	Training is added to the Employment Plan page.
What is the purpose of strengths and barriers?	Strengths determine the component that is best fit for the client. Barriers are identified so the client can be reasonably accommodated when determining the appropriate component.
How do I add a non-compliance record?	Add using the Noncompliance page.
How do I add good cause for non-compliance?	Add using the Noncompliance page.
How do I edit a non-compliance record?	Edit using the Non-Compliance Detail Page.
What does the non-compliance summary show?	Discovery Date, Non-Compliance Month, Reason, Program, Good Cause Authorization, Action.

How do I report hours a client has participated in for an eligible Component?	Report client hours on the Component Details Page.
How do I edit an Component participation record?	Track Component page is used to edit a component participation record.
Where do I input hours for Component participation?	Input hours on the Track Component Page.
Where can I rate an client's performance for a specific Component?	Track Component page to rate client performance.
Where do I find supporting documents for a Component?	Supporting Document is found in Component Details.
Where do I indicate that a Component is verified?	Overall Progress page to verify components.
Where do I see which provider this Component is reported for?	Component Details Page
How do I add a supportive service payment requested by a client?	Reimbursement Summary Page
How do I edit a payment record?	Reimbursement Details Page
What is the purpose of payment details?	The purpose is to adequately document the reimbursement.
What does the payment summary show?	A summary of the reimbursement activity.
How can I see which types of payments an client has received?	Reimbursements Details Page
How can I see when a client has received payments?	Reimbursements Details Page
Can I generate a manual task?	Yes, on the Task Search page.
Where can I find which case or client I am currently processing?	Client Summary Page
Where can I find <Dashboard/Task Search/Reports/Correspondence/Admin>?	Located on the ***SNAP Works*** main page once a user is logged in.
How do I log out of the application?	Log out on any page at the top right corner where it says 'Log Out".
What does the executive dashboard show?	Referrals, Enrollments, and State Map
What does the operations dashboard show?	This dashboard is focused on tasks (status and type).
Can I sort or modify what these reports display?	Yes, on the Executive Dashboard.
How do I export these reports? Can I export to Excel? Can I export to PDF?	Date from the Operational Dashboard can be exported to Excel or PDF

What does my dashboard show?	Task Stats, Referral Stats, Announcements, and Appointment Stats
How do I add a new system-wide announcement?	Only the System Coordinator can send messages system wide.
How do I add an emergency announcement?	Only the System Coordinator can send messages statewide or to specific counties.
Can I send an announcement to a specific county?	The System Coordinator can send messages statewide or to specific counties.
Can I send an announcement just to state staff? Provider users? Citizens?	The System Coordinator has this functionality.
How can I add or remove provider access to the application?	Only the System Coordinator has this functionality.
Can I control the capabilities of a specific provider?	Only the System Coordinator has this functionality.

55 Appendix E: Acronyms and Terminology

Acronym	Description
ABA	Able Bodied Adults
AD	Active Directory, a service that manages permissions and access to networked resources
DCO	Division of County Operations, a division within Arkansas Department of Human Services
DHS	Department of Human Services
E&T	Earnings and Training
FIM	Microsoft Forefront Identity Manager, an identity management software project used to manage user’s credentials in the Active Directory (AD) service
SNAP	Supplemental Nutrition Assistance Program
SSN	Social Security Number
URL	Uniform Resources Locator, the website address the user enters to find a website on the internet

56 Appendix F: Instructions for Learning Gain Scores

When an individual student has scored higher on their post-test than they did on their pre-test (which is the common case), use the first formula given below to determine their individual gain score. When a student scores lower on their post-test than they did on their pre-test, use the second formula given below to calculate their individual gain score. Once every student's gain score is calculated, calculate the average gain scores for the class.

Formula for positive gain (i.e., when an individual student scores higher on their post-test than on their pre-test):

$$\frac{(\text{Post-assessment} - \text{Pre-assessment})}{(100\% - \text{Pre-assessment})}$$

Where: pre-assessment is the **percent correct** on pre-unit assessment
post-assessment is the **percent correct** on the post unit assessment

<u>Ex. for student #1 below</u>:

$$\frac{70 - 45}{100 - 45} = \frac{25}{55} = 25$$

Student #1 demonstrated a gain of 25 (100 – 45   55) percentage points out of a potential 55 percentage points that they could have gained. Thus, they gained .45 (or 45%) of the possible percentage points they could have gained from pre to post assessment.

Formula for negative gain (i.e., when an individual student scores higher on their pre-test than on the post-test):

<u>Ex for student #2 below</u>:

$$\frac{50 - 75}{100 - 75} = \frac{-25}{25} = -1.00$$

Student #2 could have gained up to 25 percentage points, but instead lost 25 percentage points (or 100% of what they could have gained.)

(Note: Student scores below are in percentage correct)

Student #	Pre-Assessment Score	Post-Assessment Score	Student Gain Score
1	45%	70%	.45
2	75%	50%	-1.00
3	60%	80%	.50
4	40%	40%	.00
5	65%	70%	.14
6	90%	95%	.50
7	53%	59%	.13
8	60%	90%	.75
9	40%	95%	.92

10	42%	45%	.05
11	58%	88%	.71
12	24%	30%	.08
13	45%	89%	.80
TOTAL AVERAGE GAIN SCORE (or 31% learning gain for the entire class on average)			.31