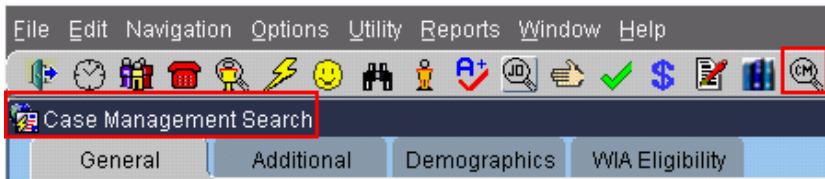

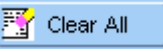


WIOA CASE MANAGEMENT SEARCH:



The Case Management Search  allows you to create lists of participants that match criteria you enter.

There are four tabs with information that you can select. It's important to remember that any criteria you enter on any tab will affect the outcome of your search. Delete the criteria entered, or use the  button to clear criteria and start a new search.

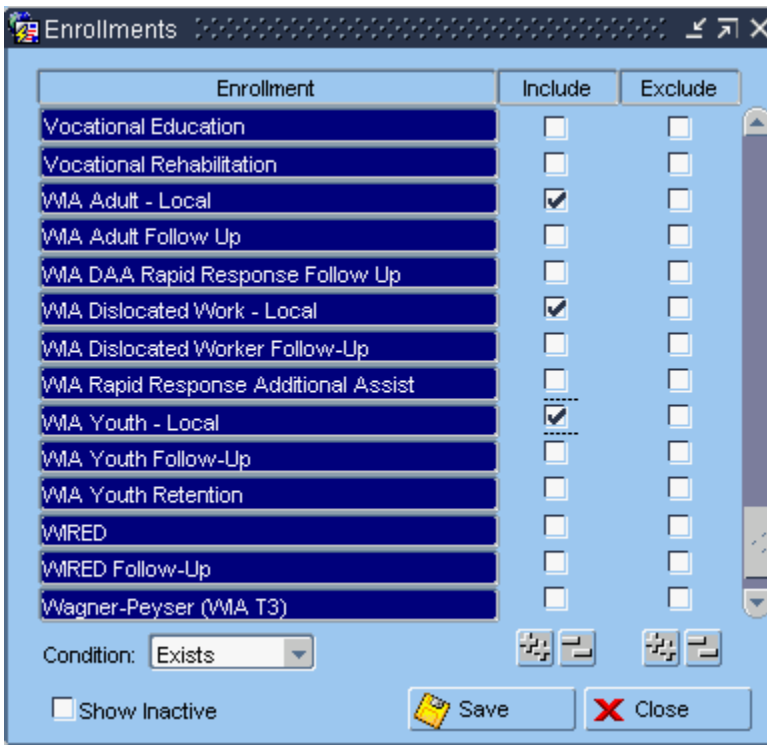
Choosing a limited amount of criteria will broaden your search and provide more records as a result. The more criteria chosen will narrow your search and provide fewer records as a result.

General:

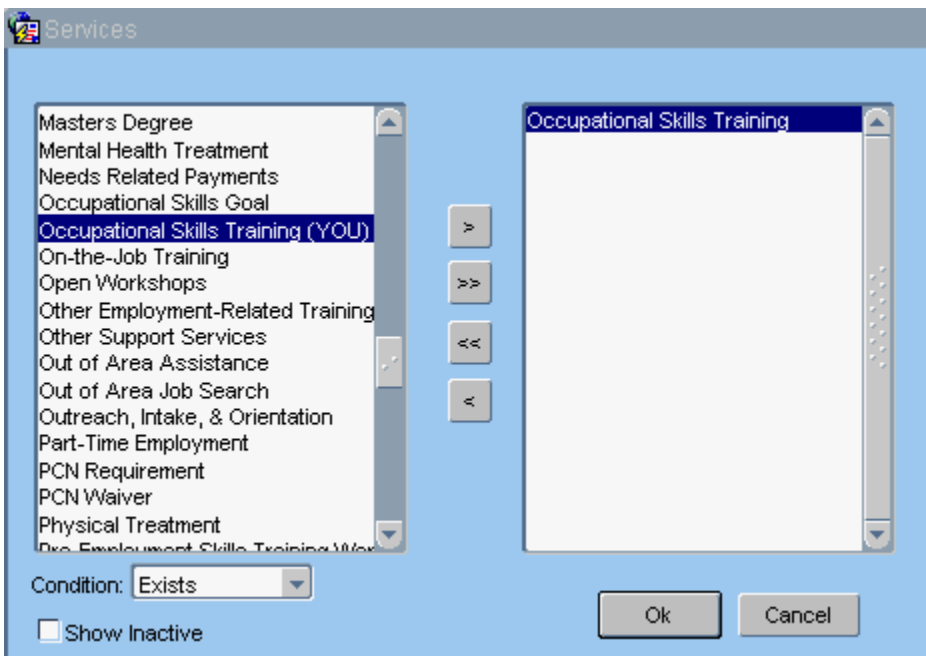
A screenshot of the Case Management Search application window showing search criteria and results. The 'General' tab is selected. The search criteria are: CM Status: Active; Staff Agn: [dropdown]; Team: [dropdown] (labeled 1); Office: [dropdown]; Maco: [dropdown]; County: [dropdown]; Enrollment Type: Multiple; Service: [dropdown] (labeled 2); Referral Service: [dropdown]; Enr/Srvc Dates: [dropdown]; Veterans Only: [checkbox]; No Notes last 30 days: [checkbox] (labeled 3); No Tasks last 30 days: [checkbox]; New Enrollments: [checkbox]; Closed Enrollments: [checkbox]. The results table shows two records: SSN xxx-xx-2026 and xxx-xx-1924. A message box states: 'Participant and case manager names have been hidden for confidentiality purposes'. The bottom status bar shows 'Total Records: 2' and 'Number Selected: 2'. Buttons for 'Select All', 'DeSelect All', 'Print Report', 'Print List', and 'Excel' are visible.

1. The General tab allows you to search for records assigned to specific staff, offices, areas, records by enrollment type, service or specific dates, records for veterans, and records related to enrollments.
2. Enter enrollment type, service, or specific dates.

Double click on the Enrollment Type field to narrow your search to an enrollment. Save and Close.

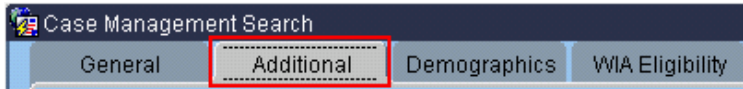


Double click on the Services field to narrow your search to services provided to participants. Save and close.

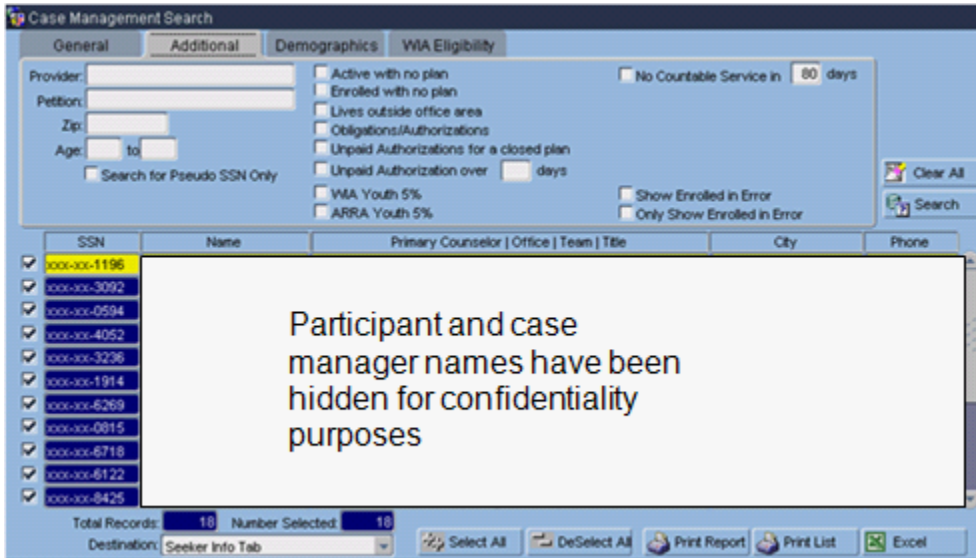


3. Enter additional criteria related to enrollments.

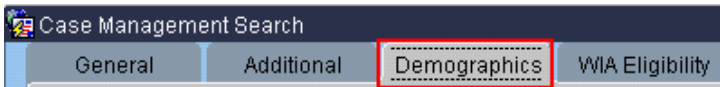
Additional:



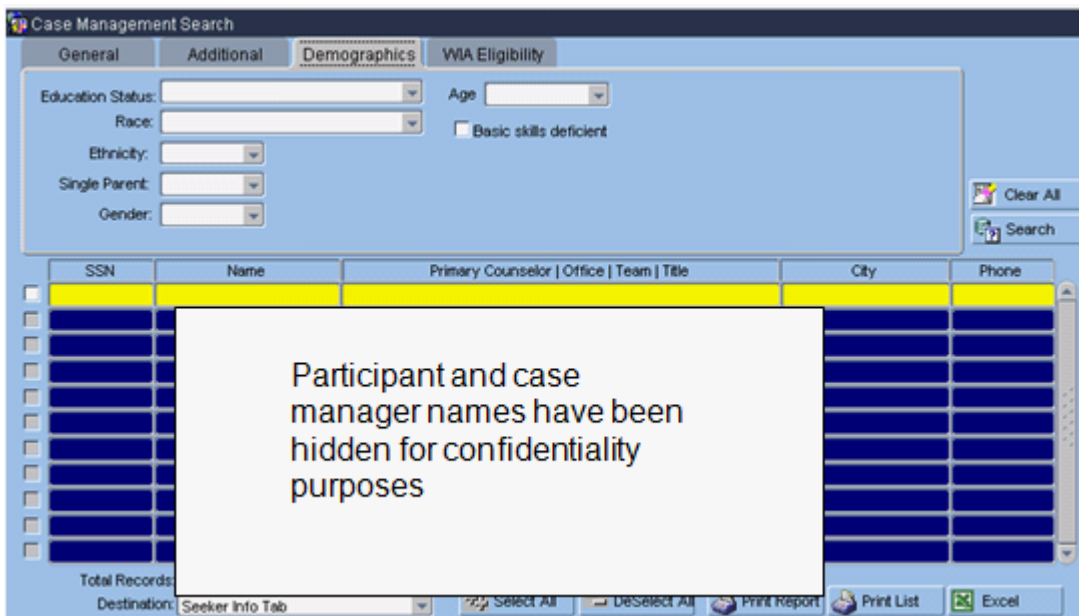
The Additional tab allows you to search for information related to vendors, employment plans, TAA petitions, age, zip code, and WIOA 5% Youth.



Demographics:



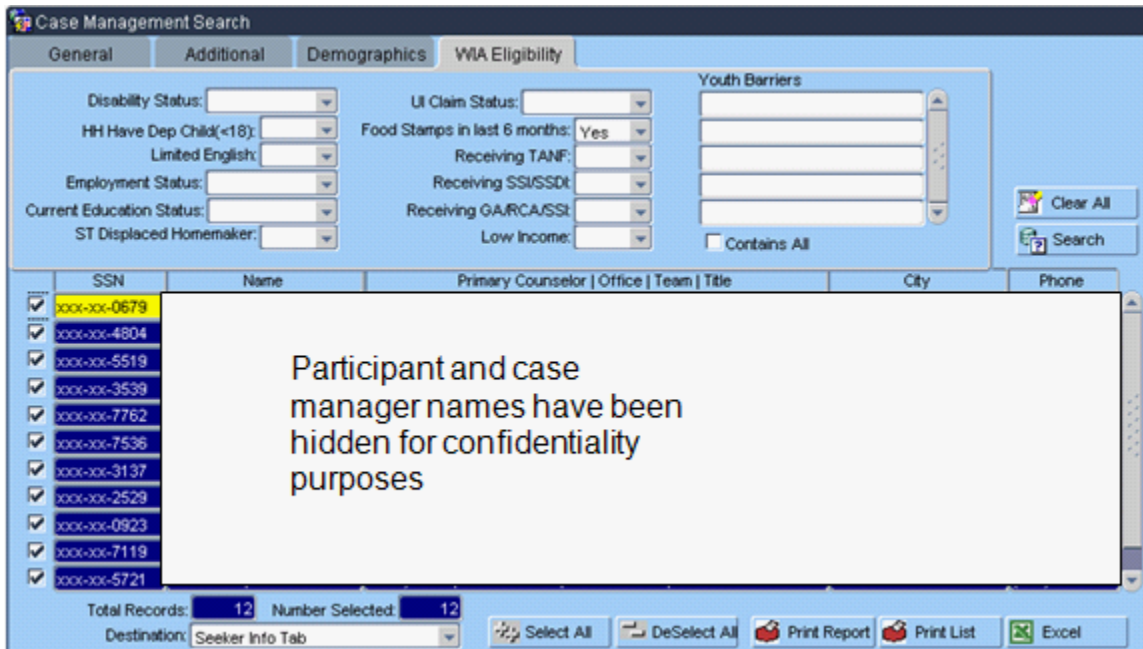
The Demographics tab allows you to search by seven specific demographics.


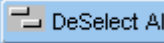


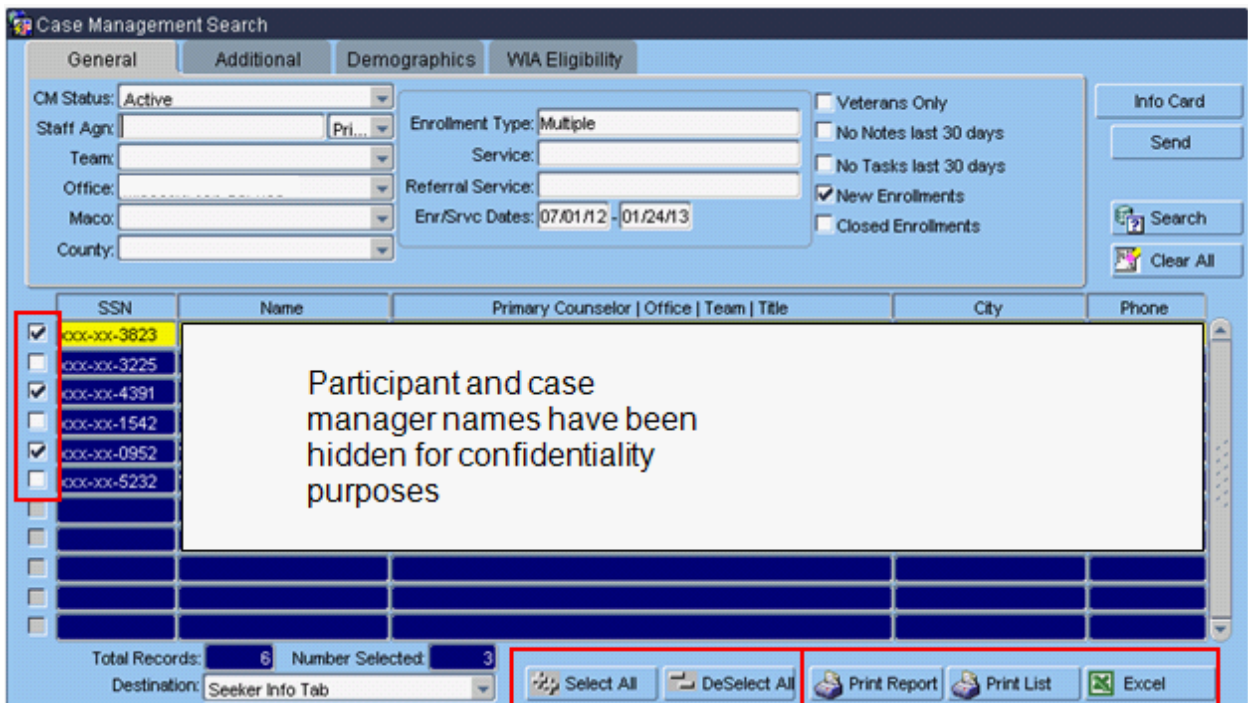
WIOA Eligibility:




The WIOA Eligibility tab provides more specific demographic detail.



Click on  to show all records. Click on , then click the checkbox in front of the SSN field to narrow participant lists.



You can print lists in three different formats:

1.  **Print Report**, which provides detailed information about participant enrollments:

Case Management Customer Report


Assigned To: Case Manager

<p>Name: Participant information Mail Addr: has been hidden for confidentiality purposes Res Addr: Phone: Searchable: y Last Note: 01/29/09 Next Appl: Next Cont: # Sanctions: 0</p>	<table border="1"> <thead> <tr> <th>TL</th> <th>Service</th> <th>Date</th> <th>Hrs</th> <th>Enrollment</th> </tr> </thead> <tbody> <tr> <td></td> <td>Housing</td> <td>02/08/08</td> <td>0</td> <td>WIA Youth - Local</td> </tr> <tr> <td></td> <td>Other Support Services</td> <td>07/16/08</td> <td>0</td> <td rowspan="3">Possible Enrollment</td> </tr> <tr> <td></td> <td>Transportation</td> <td>02/08/08</td> <td>0</td> </tr> <tr> <td></td> <td>Younger Youth Basic Skills Goal</td> <td>02/08/08</td> <td>0</td> </tr> <tr> <td></td> <td>Youth Supportive Services</td> <td>02/08/08</td> <td>0</td> <td></td> </tr> </tbody> </table>	TL	Service	Date	Hrs	Enrollment		Housing	02/08/08	0	WIA Youth - Local		Other Support Services	07/16/08	0	Possible Enrollment		Transportation	02/08/08	0		Younger Youth Basic Skills Goal	02/08/08	0		Youth Supportive Services	02/08/08	0	
TL	Service	Date	Hrs	Enrollment																									
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	Transportation	02/08/08	0																										
	Younger Youth Basic Skills Goal	02/08/08	0																										
	Youth Supportive Services	02/08/08	0																										

2.  **Print List**, which provides participant Social Security Number, name, staff, city, and phone number

Case Management Customer List

SSN	Customer Name	Staff	City	Phone
	Participant information has been hidden for confidentiality purposes		KALISPELL	
			KALISPELL	
			PABLO	
			LIBBY	
			LIBBY	
			LIBBY	

3.  **Excel**, which provides the same information as the Print List but in an Excel format

	A	B	C	D	E
1	SSN	Name	Counselor	City	Phone
2	XXX-XX-XXX1	Participant 1	COUNSELOR 1	KALISPELL	
3	XXX-XX-XXX2	Participant 2	COUNSELOR 1	KALISPELL	
4	XXX-XX-XXX3	Participant 3	COUNSELOR 2	PABLO	
5	XXX-XX-XXX4	Participant 4	COUNSELOR 3	LIBBY	
6	XXX-XX-XXX5	Participant 5	COUNSELOR 3	LIBBY	
7	XXX-XX-XXX6	Participant 6	COUNSELOR 3	LIBBY	
8	XXX-XX-XXX7	Participant 7	COUNSELOR 2	RONAN	
9	XXX-XX-XXX8	Participant 8	COUNSELOR 3	LIBBY	
10	XXX-XX-XXX9	Participant 9	COUNSELOR 2	POLSON	
11	XXX-XX-XXX10	Participant 10	COUNSELOR 3	LIBBY	
12	XXX-XX-XXX11	Participant 11	COUNSELOR 3	TROY	
13	XXX-XX-XXX12	Participant 12	COUNSELOR 4	KALISPELL	
..					

If you have any difficulties, or receive a message in the lower left-hand corner that says, "Field protected against update," email the WIOA Mworks Help Desk at DDLWSDMWorksWIOAHelp@mt.gov or email/call one of the WIOA staff.