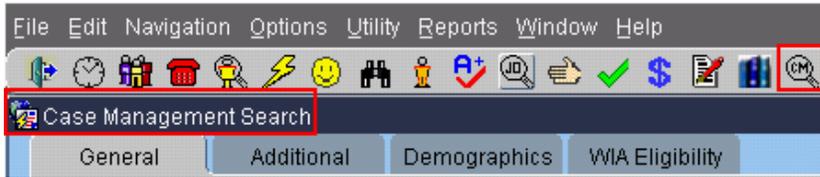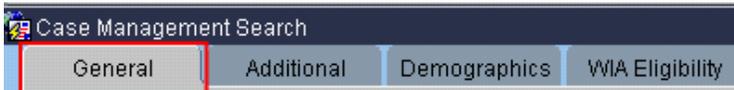# WIOA CASE MANAGEMENT SEARCH:

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 Clear All 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:

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.
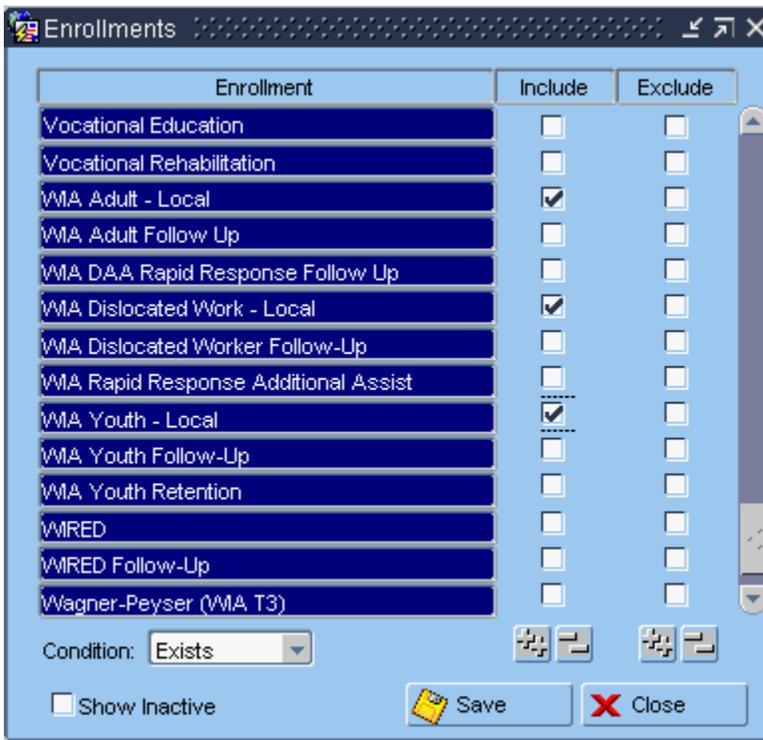
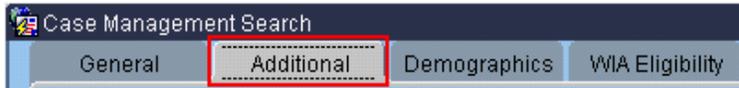Double click on the Services field to narrow your search to services provided to participants. Save and close.
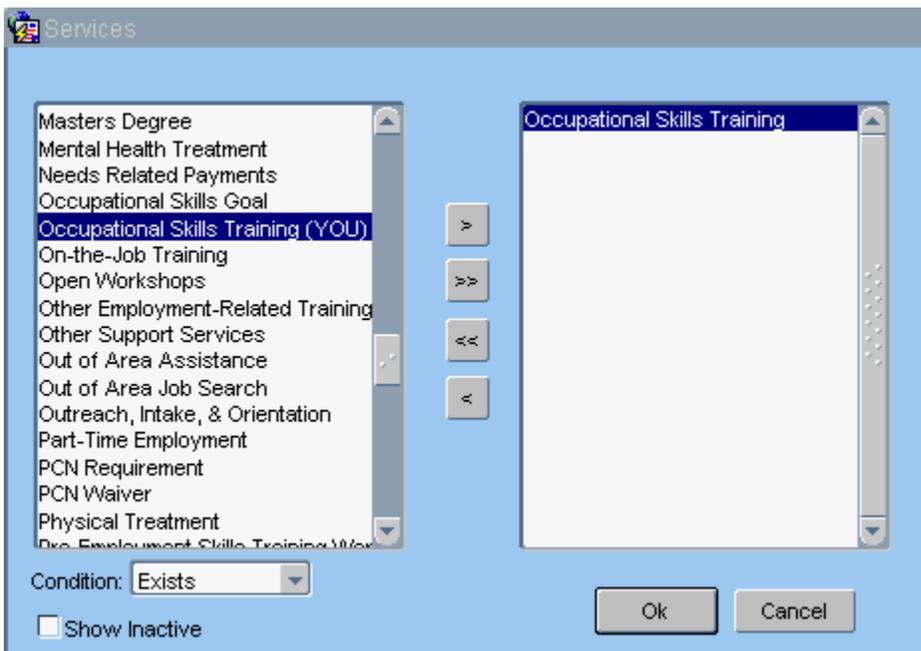
3. Enter additional criteria related to enrollments.

Additional:

The Additional tab allows you to search for information related to vendors, employment plans, TAA petitions, age, zip code, and WIOA 5%Youth.
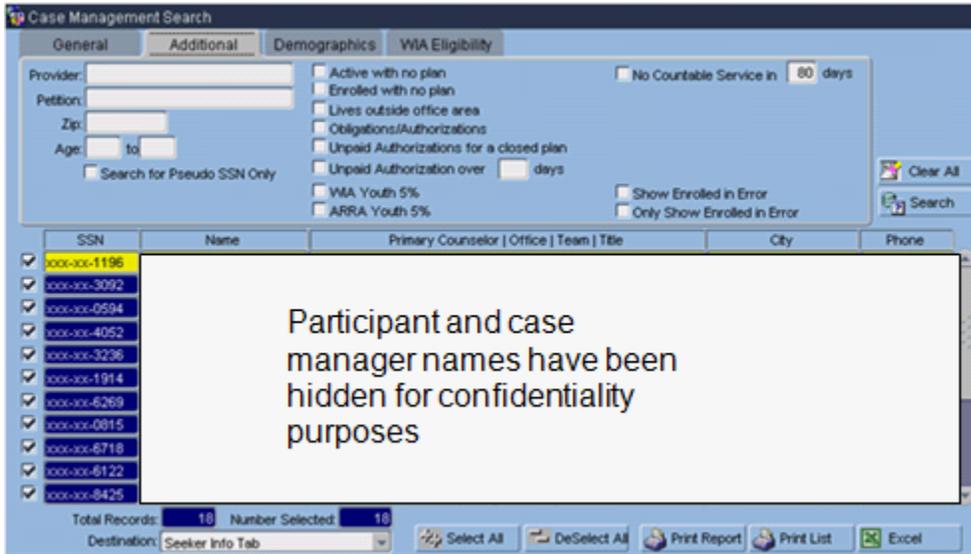
Demographics:
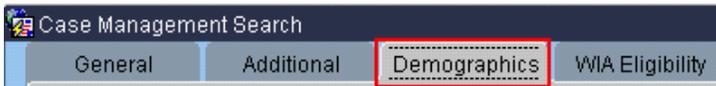
The Demographics tab allows you to search by seven specific demographics.
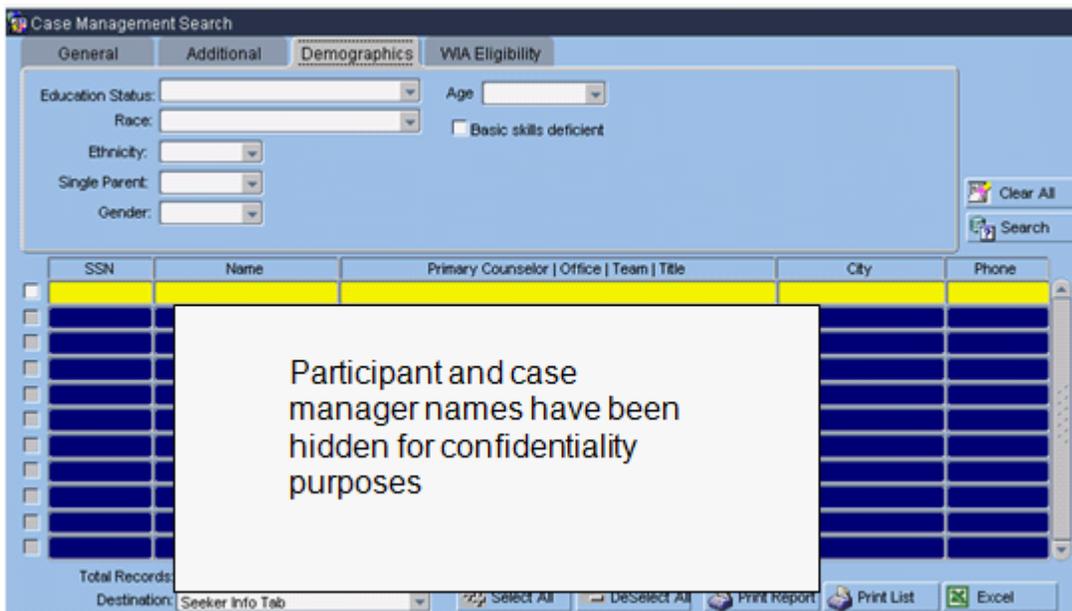
WIOA Eligibility:
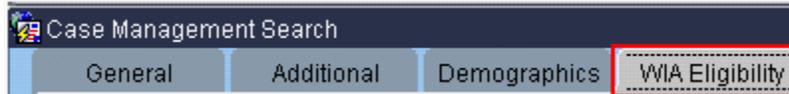
The WIOA Eligibility tab provides more specific demographic detail.

Click on [Select All] to show all records. Click on [DeSelect All], 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

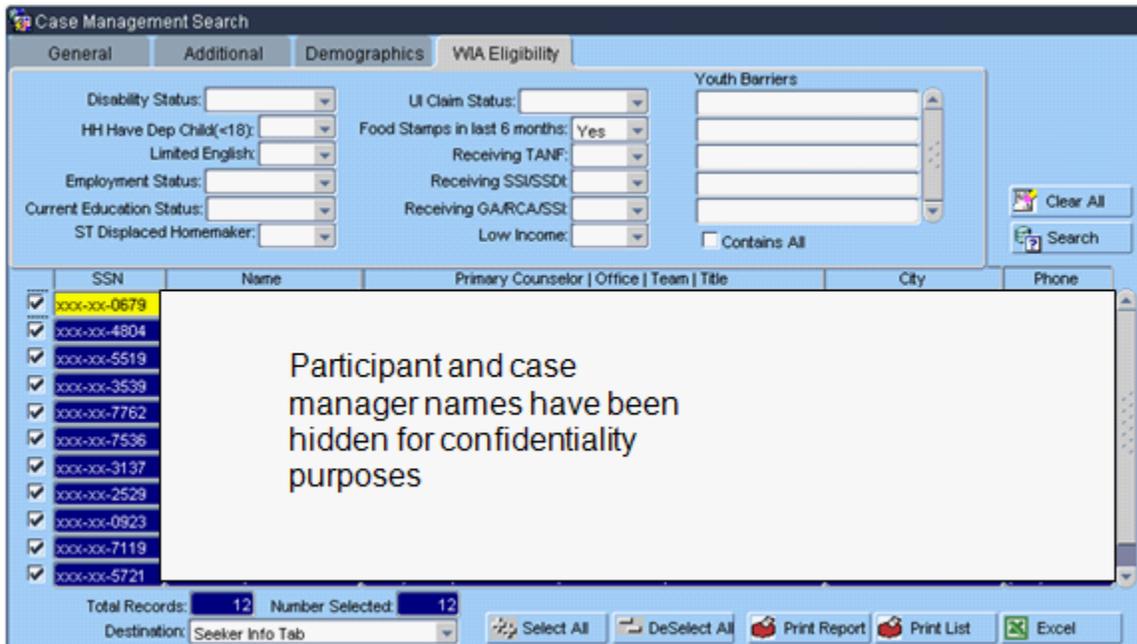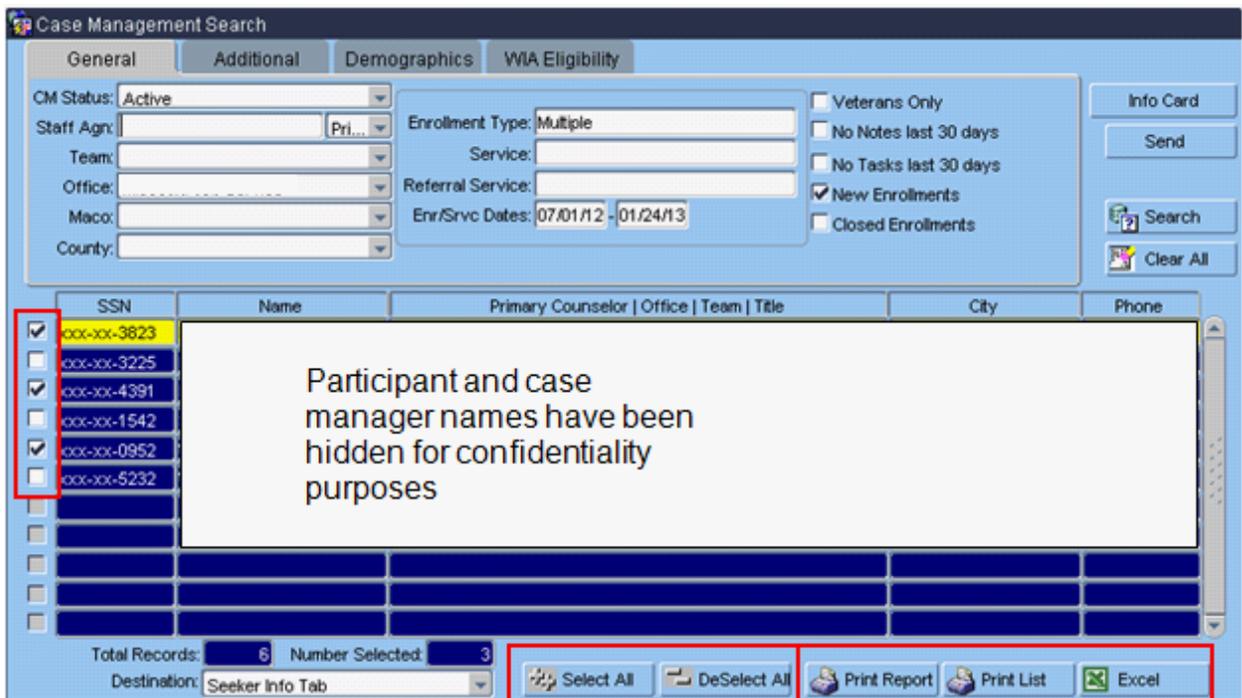|		TL	Service	Date	Hrs	Enrollment
Assigned To:	Case Manager					
Name: Mail Addr:	Participant information has been hidden for confidentiality purposes		Housing	02/08/08	0	WIA Youth - Local
Res Addr:			Other Support Services	07/16/08	0	Possible Enrollment
			Transportation	02/08/08	0	
Phone:	Searchable: Y		Younger Youth Basic Skills Goal	02/08/08		
Last Note: 01/29/09			Youth Supportive Services	02/08/08		
Next Appt: Next Cont:	# Sanctions: 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-XX10	Participant 10	COUNSELOR 3	LIBBY	
12	XXX-XX-XX11	Participant 11	COUNSELOR 3	TROY	
13	XXX-XX-XX12	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 DDLIWSDMWorksWIOAHelp@mt.gov or email/call one of the WIOA staff.