

# CMS Documentation



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# Table of Contents

|   |                    |
|---|--------------------|
| <a href="#">Document Summary</a>  | <a href="#">7</a>  |
| <a href="#">Key Features and Functionalities:</a>                           | <a href="#">7</a>  |
| <a href="#">System Integration and APIs:</a>                                | <a href="#">7</a>  |
| <a href="#">Security and Data Integrity:</a>                                | <a href="#">7</a>  |
| <a href="#">User Roles and Responsibilities:</a>                            | <a href="#">8</a>  |
| <a href="#">Usage and Maintenance:</a>                                      | <a href="#">8</a>  |
| <a href="#">What is CMS?</a>  | <a href="#">9</a>  |
| <a href="#">What is LaunchPad?</a>  | <a href="#">10</a> |
| <a href="#">1. Case Management</a>  | <a href="#">10</a> |
| <a href="#">2. Compliance and Reporting</a>                                 | <a href="#">10</a> |
| <a href="#">3. Participant Engagement</a>                                   | <a href="#">10</a> |
| <a href="#">4. Employer and Job Placement Integration</a>                   | <a href="#">10</a> |
| <a href="#">5. Training and Support Services Management</a>                 | <a href="#">11</a> |
| <a href="#">6. Customizable Workflows</a>                                   | <a href="#">11</a> |
| <a href="#">7. Collaboration and Coordination</a>                           | <a href="#">11</a> |
| <a href="#">Areas of Overlap between Launchpad and CMS:</a>                 | <a href="#">11</a> |
| <a href="#">Login Screen</a>  | <a href="#">12</a> |
| <a href="#">Person Search</a>   | <a href="#">13</a> |
| <a href="#">The List Person Data Grid</a>                                   | <a href="#">13</a> |
| <a href="#">Why is it important to know how to look up a person in CMS?</a> | <a href="#">14</a> |
| <a href="#">Assigning Roles</a>   | <a href="#">19</a> |
| <a href="#">Casenotes</a>   | <a href="#">21</a> |
| <a href="#">Attendance</a>  | <a href="#">22</a> |
| <a href="#">Student Clock-In Screen</a>                                     | <a href="#">22</a> |
| <a href="#">Recording an Absence</a>  | <a href="#">24</a> |
| <a href="#">Enrollment</a>  | <a href="#">25</a> |
| <a href="#">This UI is Different</a>  | <a href="#">26</a> |
| <a href="#">The Enrollment Entry/Edit Screen</a>                            | <a href="#">27</a> |
| <a href="#">The Outcome Entry/Edit Screen</a>                               | <a href="#">28</a> |
| <a href="#">Office</a>  | <a href="#">30</a> |
| <a href="#">Office Detail</a>   | <a href="#">30</a> |
| <a href="#">Office Staff</a>  | <a href="#">30</a> |
| <a href="#">Office Rooms</a>  | <a href="#">31</a> |
| <a href="#">Office Courses</a>  | <a href="#">31</a> |
| <a href="#">Business</a>  | <a href="#">32</a> |
| <a href="#">The Business Grid Tabs</a>                                      | <a href="#">36</a> |
| <a href="#">Adding A New Business Record</a>                                | <a href="#">37</a> |
| <a href="#">Business Branch</a>   | <a href="#">38</a> |
| <a href="#">Adding A Business Branch Case Note</a>                          | <a href="#">39</a> |
| <a href="#">How To Add a New Multi-Branch Business</a>                      | <a href="#">40</a> |

|  |    |
|--|----|
| Examples of Multi-Branch Businesses                          | 41 |
| Why an Accurate De-Duplicated Business Database is Important | 46 |
| What is the Value of Recording all Business Interactions     | 47 |
| 1. Enhanced Accountability and Transparency                  | 47 |
| 2. Improved Relationship Management                          | 47 |
| 3. Informed Decision-Making and Strategy Development         | 47 |
| 4. Enhanced Coordination and Collaboration                   | 47 |
| 5. Documentation of Outcomes and Impact                      | 47 |
| 6. Efficient Use of Resources and Time Management            | 48 |
| 7. Compliance with Legal and Grant Requirements              | 48 |
| Jobs   | 49 |
| Current Job Openings Grid                                    | 49 |
| List of Job Families   | 51 |
| Workshop   | 52 |
| Finding Workshops  | 52 |
| Creating a New Workshop                                      | 53 |
| Workshop Duplication Feature                                 | 56 |
| Issue Resolution: Deleting all Attendees                     | 59 |
| Contracts  | 60 |
| Finding Contracts  | 60 |
| New Contract Wizard  | 61 |
| Contract Printing  | 67 |
| Contract Template Editing                                    | 68 |
| Reports  | 69 |
| Attendance Summary Report                                    | 69 |
| Roster Report  | 70 |
| FTE Enrollment Report  | 72 |
| Year-To-Date Learners Report                                 | 72 |
| Student Absence Report                                       | 73 |
| Upcoming Birthdays Report                                    | 73 |
| Outcome Credits Report                                       | 74 |
| CASAS Skill Gain Report                                      | 74 |
| HSE/Diploma Report   | 75 |
| Retention/Credential Report                                  | 76 |
| Upcoming Workshops Report                                    | 76 |
| Open Doors By Date Range Report                              | 77 |
| FTE Monthly Report   | 77 |
| Wage-Based Contracts Report                                  | 78 |
| Admin Reports/Obligations Report 1                           | 78 |
| Admin Reports/Duplicate Person Report                        | 80 |
| Admin  | 81 |
| Programs   | 81 |
| Groups   | 81 |
| Funds  | 82 |

|   |     |
|---|-----|
| Activity  | 83  |
| Contract Templates Administration   | 84  |
| Test Codes  | 85  |
| EdLevel Ranges  | 86  |
| School Days   | 87  |
| Roles   | 88  |
| Excuses   | 89  |
| Drop Codes  | 90  |
| Exclude Codes   | 90  |
| CMS User Maintenance Roles and Responsibilities   | 91  |
| Creating a New Staff User   | 91  |
| Deactivating A Staff User   | 91  |
| Roles Maintenance Screen  | 92  |
| Using Excel Pivot Tables to Enhance CMS Reports   | 93  |
| Tips and Troubleshooting  | 96  |
| 1. What if I click Save but do not see the confirmation message?  | 96  |
| 2. How can I sort the data in the grid I am looking at?   | 97  |
| 3. What are My Clients, My Trainees and My Students?  | 97  |
| 4. What does “Update Last Clock-in Dates” do and why is it important?   | 98  |
| 5. How can I add a position opening if there is no business branch created yet?                                   | 99  |
| 6. Why would I need to use the Clear Results or Reset Filter buttons?   | 100 |
| 7. How can I find out how much we have paid a participant by funding code?  | 101 |
| 8. How do I zoom in so that the words on the screen are larger?   | 102 |
| 9. How can I maximize the time CMS remains open and ready for use?  | 103 |
| 10. How can I get a list of My Clients sorted by Last Casenote Date?  | 103 |
| 11. What do I do if I get a “Something Went Wrong” error?   | 104 |
| 12. How do I check for duplicate records and delete them?   | 105 |
| 13. When reporting issues, use clear and accurate terminology.  | 106 |
| 14. What is the process for requesting new functionality?   | 107 |
| 15. How To Create an IWT (Incumbent Worker Training) contract?  | 107 |
| 16. How do I set the office signer for OJT contracts?   | 109 |
| 17. What is the quickest way to get to Vendor Validation from anywhere in CMS?                                    | 109 |
| 18. How do you set up an Open Doors student?  | 109 |
| 19. How do you update a person’s email address and/or phone?  | 110 |
| 20. How do you create a multi-day workshop where each day is the same? (Same start/end time, room and instructor) | 110 |
| 21. How do I look up a Person record in CMS?  | 113 |
| Technologies Used   | 114 |
| Benefits of each technology:  | 114 |
| Hosted on AWS (Amazon Web Services):  | 115 |
| Glossary  | 116 |
| Entity Relationship Diagram (ERD)   | 119 |
| Updated ERD As Of Jun 24, 2024  | 125 |
| CMS SQL Table and Field Names   | 129 |



|   |     |
|---|-----|
| 1. Person Table (Parent Table)                          | 129 |
| personaddit (one to one with Person)                    | 130 |
| 2. Office Table (Parent Table)                          | 131 |
| 3. Business Table (Parent Table)                        | 132 |
| 4. Contract Table (References Person and Office)        | 132 |
| 5. Address Table (References Person)                    | 133 |
| 6. Role and PersonRole Tables                           | 133 |
| 7. LCEnroll Table (References Person and Office)        | 134 |
| 8. LCGroup Table (References Learner Group)             | 134 |
| 9. LC Learner Group Table (References Person and Group) | 134 |
| How To Install DBeaver (Database Manager)               | 135 |
| Introduction to SQL and MariaDB                         | 136 |
| Understanding the Database Tables                       | 136 |
| Basic SQL Queries                                       | 136 |
| 1. Selecting All Data from a Table                      | 136 |
| 2. Selecting Specific Columns                           | 137 |
| 3. Using WHERE Clause to Filter Data                    | 137 |
| Example: Find Persons by Last Name                      | 137 |
| Example: Find Persons Born After a Certain Date         | 137 |
| 4. Sorting Results with ORDER BY                        | 137 |
| Example: Sort Persons by Last Name                      | 137 |
| 5. Joining Tables                                       | 138 |
| Example: Retrieve Person and Their Address              | 138 |
| Understanding the Query                                 | 138 |
| 6. Using Aliases for Simplicity                         | 138 |
| 7. Filtering Joined Data                                | 138 |
| Example: Persons in a Specific City                     | 138 |
| 8. Using Aggregate Functions                            | 139 |
| Example: Count Number of Persons                        | 139 |
| Example: Grouping Data                                  | 139 |
| 9. Joining Multiple Tables                              | 139 |
| Example: Persons, Their Roles, and Offices              | 139 |
| Putting It All Together                                 | 140 |
| Example Scenario: Finding Active Contracts              | 140 |
| Explanation   | 140 |
| Tips for Writing SQL Queries                            | 140 |
| Conclusion  | 140 |
| Additional Resources                                    | 141 |
| NON-DISCLOSURE AGREEMENT (NDA)                          | 142 |
| 1. Purpose  | 142 |
| 2. Confidential Information                             | 142 |
| 3. Obligations of the Employee                          | 142 |
| 4. Exceptions to Confidentiality                        | 142 |
| 5. Duration of Confidentiality Obligations              | 143 |

|  |                     |
|--|---------------------|
| <a href="#">6. Breach of Agreement</a> | <a href="#">143</a> |
| <a href="#">7. Return of Materials</a> | <a href="#">143</a> |
| <a href="#">8. Miscellaneous</a>       | <a href="#">143</a> |
| <a href="#">9. Governing Law</a>       | <a href="#">143</a> |
| <a href="#">10. Signatures</a>         | <a href="#">143</a> |

# Document Summary

The document is a comprehensive manual for the Skillsource Customer Management System(CMS), detailing functionalities, user roles, and procedures for managing various aspects of the system. **It is recommended that you NOT print this document. It is best studied in its google doc form because you can use keyboard shortcuts to enlarge the screen (ctrl +) or diminish the screen (ctrl -) as needed for viewing the screen shots.** Here's a summarized breakdown of its key contents:

## Key Features and Functionalities:

1. Login and User Management: Instructions on secure login practices, user logout reminders, and management of user roles, such as creating and deactivating staff user accounts.
2. Participant Management:
  - Searching and managing participant records including using advanced search features to prevent duplicate entries.
  - Detailed guidance on adding and editing various participant-related data like attendance, casenotes, and enrollments.
3. Workshop and Job Management:
  - Steps for creating and managing workshops including duplication features for repeated events.
  - Guidance on managing job openings, including adding new jobs and handling business branches.
4. Business and Contract Management:
  - Procedures for adding new businesses and branches, managing contracts, including creating, editing, and printing contracts using a wizard interface.
5. Reporting:
  - Various reports such as attendance, job openings, upcoming workshops, and detailed participant reports are described with instructions on generating and customizing these reports.
6. Technical Support and Troubleshooting:
  - Tips for handling common issues such as unsaved data and sorting data grids. Everything in this section is from support calls I have received from users.
  - Guidance on using pivot tables to enhance report functionalities.

## System Integration and APIs:

- The document describes integration with Google Docs, Google Calendar, ONET, and Abila MIP accounting, highlighting the system's capability to work seamlessly with external applications via APIs.

## Security and Data Integrity:

- Emphasis on secure practices such as automatic logout after inactivity and thorough checks to prevent duplicate participant records.

## User Roles and Responsibilities:

- Detailed descriptions of various user roles from administrative to functional levels like CMSADMIN, MANAGER, TRAINER, TEACHER, and STAFF, outlining their access levels and system capabilities.

## Usage and Maintenance:

- Instructions on regular maintenance tasks like contract template editing and the importance of precise and clear communication when reporting issues.

The document serves as a full manual intended to guide users through all functionalities of the CMS, ensuring they can effectively manage data, fulfill operational needs, and maintain system integrity.

# What is CMS?



Many years before “CMS” became an acronym for “**Content** Management System” in the late 1990s, the Skillsource CMS stood for “**Customer** Management System.” If we had a crystal ball back then we would have used **CRM** for Customer Relationship Management because that’s what CMS has always been. This CMS has always been our CRM. CRM systems are specifically designed to manage **customer data, interactions, and business processes** related to customer relationships, which could be what some might refer to informally as a “Customer Management System.” So when people ask what this CMS is, it is most descriptive and accurate to say “**It is our in-house CRM.**”

Using a system that holds **Personally Identifiable Information (PII)** requires a high level of sensitivity and diligence, as improper handling of such data can lead to significant privacy violations, legal consequences, and harm to individuals. PII includes data like names, addresses, social security numbers, and other identifying details that can be exploited if exposed to unauthorized parties. Mishandling PII not only risks the trust of users but also exposes systems to potential data breaches and penalties. You may be asked to sign an NDA similar to the following: [NON-DISCLOSURE AGREEMENT \(NDA\)](#)

Throughout the life of this system the developers have tried not to duplicate the functionality of whatever state MIS was required. And where possible, they have endeavored to integrate with these systems to minimize duplicate entry. In the 30 year life of CMS, many required state systems have come and gone. Currently we are waiting for the next system to be launched (sometime in 2026) and hoping they will build it with published API’s so that our CMS can have real-time integration with it. CMS currently integrates, via published API’s, with Google Docs, Google Calendar, Gmail, ONET and Abila MIP accounting.

We are hoping the new State system, based on Salesforce LaunchPad, will be capable enough to allow all initial data entry to be done in LaunchPad and then via published API’s, CMS will retrieve data as needed to avoid duplicate entry. See the next section for more information about LaunchPad.

# What is LaunchPad?

It appears at this point that the next State required system is a Salesforce application called LaunchPad. LaunchPad for WIOA (Workforce Innovation and Opportunity Act) is a specialized version of Salesforce LaunchPad designed to help organizations comply with and manage the requirements of the WIOA program. If CMS and LaunchPad co-exist for some period of time, the application of first data entry will probably be LaunchPad. If the State permits, CMS can read data from LaunchPad using API's that LaunchPad provides so as to prevent duplicate data entry. If the State does not permit, then we will be forced to use less elegant ways to integrate the two systems.

Key features of LaunchPad for WIOA include:

## 1. Case Management

- **Client Tracking:** It allows workforce development agencies to track individuals enrolled in WIOA programs, recording their progress from intake through to employment or training outcomes.
- **Service Plans:** Users can create and manage individualized service plans, detailing the support services offered, the training provided, and any job placement activities.

## 2. Compliance and Reporting

- **Data Collection:** LaunchPad for WIOA helps agencies collect the necessary data for WIOA compliance, such as participant demographics, services received, outcomes, and performance metrics.
- **Performance Reporting:** The system generates reports required for federal and state-level compliance, including tracking key WIOA performance indicators like employment retention, earnings, and credential attainment.

## 3. Participant Engagement

- **Intake and Enrollment:** The platform offers tools for streamlined intake and enrollment processes, making it easier to capture participant information and assign them to the appropriate WIOA programs or services.
- **Self-Service Portals:** Some versions of LaunchPad for WIOA provide a self-service portal where participants can update their information, view available services, and track their progress in the program.

## 4. Employer and Job Placement Integration

- **Job Matching:** Agencies can connect job seekers with employers, track job placement efforts, and record job outcomes, ensuring that participants find meaningful employment.
- **Employer Engagement:** LaunchPad for WIOA includes tools for managing employer relationships, facilitating job fairs, and coordinating outreach to potential hiring companies.

## 5. Training and Support Services Management

- **Training Program Tracking:** The system helps manage participant enrollment in training programs, track progress through certifications, and monitor outcomes.
- **Support Services:** It supports the management of additional services such as transportation assistance, childcare, and other wrap-around services essential for WIOA participants.

## 6. Customizable Workflows

- **Tailored Processes:** Agencies can customize workflows to match the unique needs of their local workforce development programs, allowing flexibility in how WIOA services are delivered and tracked.
- **Automated Notifications:** Alerts and reminders for case managers help ensure participants stay on track with their service plans, training, and job search activities.

## 7. Collaboration and Coordination

- **Partner Agency Collaboration:** LaunchPad for WIOA allows workforce agencies to collaborate with partner organizations, such as training providers, employers, and other social services, ensuring a comprehensive support network for participants.

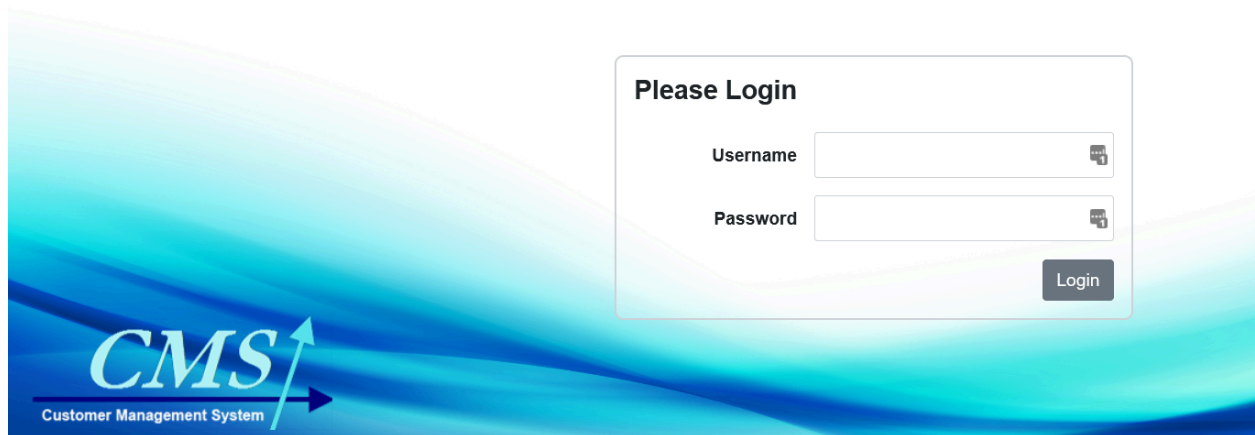
LaunchPad for WIOA ensures that workforce development organizations can efficiently manage participants, track outcomes, and meet the reporting requirements of the WIOA legislation. By offering an integrated solution for data management and compliance, it helps these organizations deliver better services and improve job placement outcomes for participants.

## Areas of Overlap between Launchpad and CMS:

(LaunchPad has basic functionality in all these areas but lacks the features we currently depend on)

- **Participant Workshops:** It is very unlikely the LaunchPad functionality can replace CMS without custom programming. Google Calendar integration, workshop types, attendance management and certificate printing are some examples of functionality that LaunchPad will not have without customization.
- **Contracting:** Business and education contracts (OJT, ITA, IWT, etc). MIP integration is not something LaunchPad will be able to handle.
- **Learning Center Attendance:** LaunchPad will not be able to take over this functionality.
- **Open Doors:** LaunchPad will not be able to do what CMS does.

# Login Screen



A login is required in order to protect the personal information that CMS captures. The login screen has been optimized for mobile phones making it possible to access CMS on small screen devices. However, be aware that most of the CMS screens are not optimized for small devices.

Please get into the habit of logging out whenever you leave your computer unattended. To make sure that unattended workstations never stay connected to the database, the system will automatically log you out after 15 minutes of inactivity. Inactivity means no keyboard or mouse movement for that time period.

This document is best viewed and read on-line as a google document. ***The screenshots are too small to be read when printed***, but as an online document you can zoom in and out of the screens as needed. Press **Ctrl +** to enlarge and **Ctrl -** to make it smaller. Do this now so you can see how it works.



# Person Search

## The List Person Data Grid

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Jobs

Contract

Reports

Attendance Reports

Test Tracking Reports

Workshop Reports

Open Doors Reports

Wenatchee Reports

Business Reports

Admin Reports

Admin

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Search

Advanced search

Clear Results

+ New person

Print/Export

| CMS ID | Last Name | First Name | Birthdate  | Age       | Vet | Region      | Status |
|--------|-----------|------------|------------|-----------|-----|-------------|--------|
| 150398 | STAFF     | GENERIC    | 12-02-1997 | 25 years  | N   | Chelan C... | A      |
| 142340 | KOEPKE    | RODNEY     | 01-28-1969 | 53 years  | N   | Grant Co... | A      |
| 44     | COZZALIO  | ERNESTINA  | 10-26-1968 | 54 years  | N   | Chelan C... | A      |
| 12345  | PORTZLINE | TODD       | 11-22-1977 | 45 years  | N   | Chelan C... | A      |
| 150352 | ASAS      | RTGTX      | 10-24-2021 | 1 years   | N   |             | A      |
| 111154 | AARON     | MONCAYO    | 01-14-1996 | 26 years  | N   | Douglas ... | A      |
| 149743 | WILL ANNA | DANETTE    | 10-26-1969 | 53 years  | N   | Chelan C... | A      |
| 150397 | HENDERSON | CAROL      | 09-08-1947 | 75 years  | N   | Chelan C... | A      |
| 149095 | AMMANATHU | LISA       | 08-10-1983 | 39 years  | N   | Okanoga...  | I      |
| 104989 | PEDERSON  | VERNON     | 01-30-1939 | 83 years  | N   | Grant Co... | A      |
| 2      | MILLER    | SUZANNE    | 03-09-1978 | 44 years  | N   | Grant Co... | A      |
| 84106  | MIRON     | ESTEBAN    | 09-15-1991 | 31 years  | N   | Adams C...  | A      |
| 150387 | PERSON    | NEW        | 05-03-2022 | 0 years   | N   |             | A      |
| 150396 | MILLER    | ANGIE      | 10-10-2000 | 22 years  | N   |             | A      |
| 150395 | MIRACLE   | JOHN       | 10-06-2022 | 0 years   | N   |             | A      |
| 5101   | HENDERSON | LARRY      | 05-12-1950 | 72 years  | N   | Chelan C... | A      |
| 150389 | PISCHEL   | TERRA      | 12-06-1979 | 43 years  | N   | Grant Co... | A      |
| 23654  | ADAMS     | SUSAN      | 04-30-3002 | -979 y... | N   | Chelan C... | A      |
| 149340 | WARREN    | KATHY      | 07-22-1962 | 60 years  | N   | Douglas ... | A      |
| 142736 | FOSTER    | EVAN       | 08-05-2003 | 19 years  | N   | Chelan C... | A      |

Items 1 to 20 of 133492 | Go to page: 1 / 6675

You can type in the **Search** box a **cmsID** or a **“last name”** or a **“last name, first name”**. Entering a cmsID should bring up a single record if such a record exists. Entering part of a name will bring up multiple records. *The best way to find a person if you only know their name is by typing the **last name**, [comma], [space] and the **first letter** of the first name. Double Click* on the desired row to bring up the Person profile tabs.

# Why is it important to know how to look up a person in CMS?

Every month duplicate records are created due to insufficient care taken in finding existing records. The BEST first thing to do is click on **Advanced Search** and enter the birth date or SSN. If you do not have that information then the next BEST method is to type:

**last name [comma] [space] first initial of the first name in the search field:**

Garcia, F

**Garcia, F** because I am trying to find **Felisario Garcia** and I will keep adding letters of the first name until I only have **one** page of results (20 records or less). In this case I had to add "e" and "I" to the "F" to get the following results:

| CMS ID | Last Name | First Name   | Birthdate  | Vet | Region      | Status | Last Case Note |
|--------|-----------|--------------|------------|-----|-------------|--------|----------------|
| 126323 | GARCIA    | FELICITAS    | 06-14-1971 | N   | Okanoga...  | A      |                |
| 124981 | GARCIA    | FELIPE SILVA | 09-18-1987 | N   | Grant Co... | A      |                |
| 92694  | GARCIA    | FELICIANO    | 01-09-1980 | N   | Chelan C... | A      |                |
| 91898  | GARCIA    | FELIX        | 01-27-1965 | N   | Grant Co... | A      |                |
| 19054  | GARCIA    | FELIPE       | 07-23-1960 | N   | Adams C...  | A      |                |
| 9855   | GARCIA    | FELIPE       | 12-01-1969 | N   | Douglas ... | A      |                |
| 65194  | GARCIA    | FELISARIO    | 07-06-1940 | N   | Grant Co... | A      |                |
| 25720  | GARCIA    | FELIPE       | 08-15-1962 | N   | Chelan C... | A      |                |
| 40769  | GARCIA    | FELICITAS    | 10-30-1964 | N   | Adams C...  | A      |                |
| 19426  | GARCIA    | FELA         | 11-20-1940 | N   | Grant Co... | A      |                |
| 24491  | GARCIA    | FELICITA     | 11-23-1978 | N   | Grant Co... | A      |                |
| 16007  | GARCIA    | FELIX        | 07-28-1978 | N   | Douglas ... | A      |                |
| 30371  | GARCIA    | FELIX        | 06-05-1974 | N   | Okanoga...  | A      |                |

Do the very best job you can searching for an existing record BEFORE adding a new one. If you should find what appears to be a duplicate record, notify the database administrator as soon as possible so the duplicate(s) can be removed. In database terms, a Person record is a Parent record just waiting for Child records to be added. For example, a Casenote record is a child record to a Person record. If there is more than one record and users are not aware of it, some users may add a Casenote to one record and another user may add a Casenote to the duplicate record. Which Person record is the correct one? Over time an enormous amount of bad data can be entered into the system just from the existence of duplicate records. This is also true of duplicate Business records.

A **Right Click** will bring up a context menu with other options as you can see below:

The screenshot shows the CMS interface with a sidebar on the left containing menu items: Person, Attendance, Enrollment, Test, Workshop, Office, Business, Jobs, Contract, and Reports. The main area displays a table of person records. A right-click context menu is open over the first row (CMS ID 139300, Last Name ABARCA, First Name BERNABE). The menu options are: Update Person Record, Set as sticky learner, Case notes, Workshop Quick Reg, Add to clients, Remove from clients, Add a Google Account, and Individual Attendance Report.

| CMS ID ↑↓ | Last Name ↑≡ | First Name ↑↓ |
|-----------|--------------|---------------|
| 139300    | ABARCA       | BERNABE       |
| 147918    | ABARCA       | VICTORINO     |
| 151485    | ABARCA       | JASS          |
| 151711    | ABARCA       | CARLOS        |
| 75187     | ABARCA-MOR   | SAMUEL        |
| 22184     | ABARCA-MOR   | VICTORINO     |
| 92235     | ABARRA       | JENNIFER      |
| 736       | ABBAS        | HADI          |
| 96961     | ABBERTON     | TIM           |

Right-Click Menu Options: The **Update Person Record** opens the complete multi-tab Person Profile (same as double-clicking on a row). **Set as sticky learner** is used when you want the system to remember a specific person (learner) as you move around the other screens. If Sticky Learner is set, the *Enrollment* and *Test* areas will automatically display records associated with that learner. **Case Notes** enables you to enter dated notes on your participants. There is also a button called “**Notes**” in the header of Profile screen. **Workshop Quick Reg** provides a very quick way to register a person in a workshop IF you know the Workshop number. **Add to Clients** and **Remove from Clients** gives trainers and teachers a way to manage their current people (more on this when we cover the advanced filter options). If an option is grayed-out it means that it is not a valid option.

The **Individual Attendance Report** will prompt for a date range and produce a learning center attendance report for the selected person.

If the person does not yet have a Skillsource gmail account, the **Add a Google Account** option is an automated way to create that account.

The screenshot shows the CMS interface with the sidebar on the left. The main area displays the 'PERSON TEST Details' screen. The 'Google account:' field is empty. A red box highlights the 'Add Google Acct' button. Other buttons visible are 'Notes', 'Save', 'Cancel', and 'Delete'. The 'Welcome: LARRY' message is in the top right corner.

If a Google account has been added, the actual account will be displayed under the person’s name and the “**Add Google Acct**” button will not be shown.

Search  **Advanced search**  Clear Results

By clicking “Advanced Search” button the Filter panel presents useful selection criteria options:

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

AUTO: OFF Sticky Learner: (search to set...)

Search

Advanced search

| CMS ID | Last Name    | First Name | Birthdate  | Age      | Vet | Region          | Status |
|--------|--------------|------------|------------|----------|-----|-----------------|--------|
| 150387 | PERSON       | NEW        | 05-03-2022 | 0 years  | N   |                 | A      |
| 150386 | ROSTOVA      | MASHA      | 03-31-2022 | 0 years  | N   |                 | A      |
| 150381 | DOMINGO      | RODRIGEZ   | 11-01-1987 | 34 years | N   | Okanogan County | A      |
| 150380 | SHOWFIRST    | TESTME     | 11-09-1980 | 41 years | N   |                 | A      |
| 150379 | SUPERSPECIAL | SOMEONE    | 11-09-1980 | 41 years | N   |                 | A      |
| 150378 | ANDERSON     | RENEE      | 10-10-1989 | 32 years | N   |                 | A      |
| 150376 | RRRR         | FFFF       | 10-26-2021 | 0 years  | N   |                 | A      |
| 150371 | MOUSE        | MICKY      | 10-10-1980 | 41 years | Y   | Chelan County   | A      |
| 150369 | ADAMS        | ANNA       | 10-01-2002 | 19 years | N   |                 | A      |
| 150368 | HENDERSON    | CAROL      | 09-19-1948 | 73 years | N   | Chelan County   | A      |
| 150366 | JONES        | TOM        | 09-08-2000 | 21 years | Y   | Chelan County   | A      |
| 150365 | ABRAM        | JANE       | 03-09-2006 | 16 years | N   | Chelan County   | A      |
| 150364 | DREW         | MELINA     | 10-05-1981 | 40 years | N   | Chelan County   | A      |
| 150363 | SINDEL       | CARL       | 10-18-2021 | 0 years  | N   |                 | A      |
| 150362 | MARL         | HOANA      | 10-19-2021 | 0 years  | N   |                 | A      |
| 150361 | TEST         | TEST       | 10-12-2021 | 0 years  | N   |                 | A      |
| 150360 | SCOTT        | MARVEL     | 05-17-2006 | 16 years | N   |                 | A      |
| 150359 | DECLAR       | SONITA     | 10-20-2021 | 0 years  | N   |                 | A      |
| 150358 | ANITA        | HANTAR     | 10-13-2021 | 0 years  | N   | Okanogan County | I      |
| 150357 | DASDASD      | DSADASD    | 10-10-2021 | 0 years  | N   |                 | A      |

Items 1 to 20 of 133492

Go to page:

1

/ 6675

Filter

Last modified date

mm-dd-yyyy

Birth Date

mm-dd-yyyy

SSN Last 4

SSN Last 4

SSN

SSN

Region

Select region

☐ Veteran?

Status

Select status

My Clients

☐

My Students

☐

My Trainees

☐

Office Role

Office

Select Office

Role

Select Role

Reset filter

Apply filter

The following page shows an expanded view of the **Filter** panel. Please take a moment to study the “Advanced Search” Filter options on the following page.

The “Advanced Search” provides a way to enter multiple search criteria that will be applied together when the user clicks the blue “Apply Filter” button. There is a logical **AND** operation being applied: Pull up all the records where this is true **AND** that is true **AND** that is true.

Filter

×

Last modified date

mm-dd-yyyy

Birth Date

mm-dd-yyyy

SSN Last 4

SSN Last 4

SSN

SSN

Region

Select region

▼

☐ Veteran?

Status

Select status

▼

My Clients

My Students

My Trainees

Office Role

Office

Select Office

▼

Role

Select Role

▼

Reset filter

Apply filter

You do not have to use “Advanced Search” to find a record.

### Notes on Filter (Advanced Search) Options:

**Last modified date:** This is useful for getting a list of Person records that have been recently created or edited.

**Birth Date:** This is the best way to look up a record when you have the person on the phone or at the reception desk. You will get a fairly small number of records that you can easily pick from. ***This presumes that a birth date has been entered on every person needing to be found in this way.***

**SSN Last 4:** This is another easy way to look up a record when you have the person there or on the phone.

General observations: This is called an Advanced Search tool because you can select multiple search criteria. Most of these are self explanatory, but the following need some explanation:

**My Clients:** You can right click on a Person record in the main list and select *add to Clients* OR *remove from Clients* to easily create and maintain a list of just your clients.

**My Students:** In the Additional Information tab of the Person profile there is the option to associate a staff person with a participant by Role

Trainer

Select Trainer

▼

Teacher

Select Teacher

▼

So if you are a person’s Trainer then that person will be included in the list of **My Trainees**. Likewise, if you are a person’s primary Teacher (in the learning center) then that person will be included in the list of **My Students**.

Searching by **Office and Role** is useful for maintaining staff roles, which controls access and functionality.

**Apply filter:** Click this button after you have made all your selections. Click the **Reset filter** button when you want to clear all your selections.

## Opening Screen

Note the red box around the Page controls just above. At the time of this documentation there were 133,492 person records. These records are grouped in 6,675 pages of 20 records each. The page controls |> < > >| should be self explanatory:

- |> first page.
- < previous page.
- > next page
- >| last page.

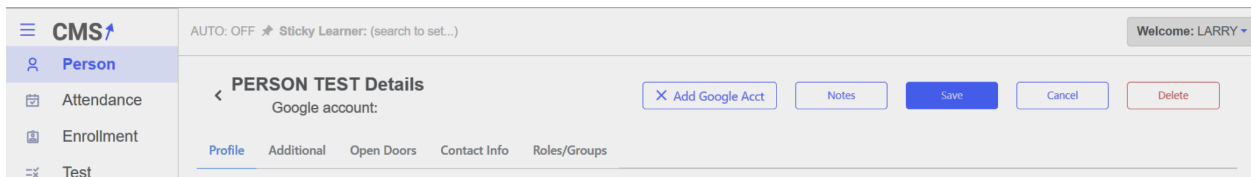
### Select Columns Tool

This functionality is available in all the basic data grids and can be very helpful in limiting or expanding the number of columns being displayed. Or if you are not seeing a column that you need, check the “Select Columns” tool to see if it is available.

Also notice the up/down arrows ↑↓ to the right of each column name. This means you can sort the list by clicking on the column header. It is a toggle, so clicking once will sort one way and clicking again will sort the opposite way.

When you double click on a Person record(row) you will see the **Details** screen. These details are grouped under five tabs:

### Profile, Additional, Open Doors, Contact Info and Roles/Groups:

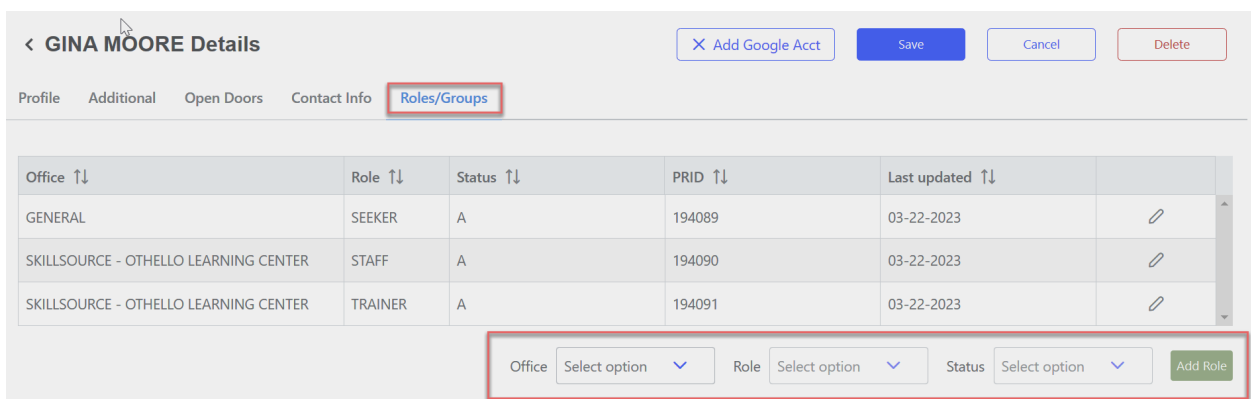





These five tabs manage lots of data and the most important thing to remember is that a change on any tab will **NOT** be saved until you click the blue **Save** button above. This is the only screen that works this way. The **Roles/Groups** tab has some additional edit/save functionality that is important to be aware of.

Again, if you make changes on any of the tabs and are called away from your computer for some emergency, your **changes will not be saved** when an “inactivity” logout occurs. For this reason, it is a good habit to frequently click the save button for good measure.

## Assigning Roles

In CMS roles are primarily used to control access to administrative functionality.



| Office ↑↓                             | Role ↑↓ | Status ↑↓ | PRID ↑↓ | Last updated ↑↓ |   |
|---------------------------------------|---------|-----------|---------|-----------------|---|
| GENERAL                               | SEEKER  | A         | 194089  | 03-22-2023      |  |
| SKILLSOURCE - OTHELLO LEARNING CENTER | STAFF   | A         | 194090  | 03-22-2023      |  |
| SKILLSOURCE - OTHELLO LEARNING CENTER | TRAINER | A         | 194091  | 03-22-2023      |  |

Office

Select option

Role

Select option

Status

Select option

Add Role

The process for creating a new Role is as follows:

1. Select the Office from the **Office** dropdown
2. Select the Role from the **Role** dropdown. (Note: A user is not allowed to have a “Staff” role in more than one office, If the user needs this kind of access, then add a “XStaff” role for each of those additional offices)
3. Select the Status from the **Status** dropdown. (Note: the “Deleted” status simply marks the role for deletion. It does not actually delete the role from the database)
4. Then click the green **Add Role** button.

5. **Note:** The new role will not be added to the database until the blue **Save** button is clicked.

If you need to modify the status of an existing role, click on the little edit icon in the rightmost column. When you click it the UI will change as indicated below by the red outline.

< GINA MOORE Details

Profile Additional Open Doors Contact Info Roles/Groups

| Office ↑↓                             | Role ↑↓ | Status ↑↓     | PRID ↑↓ | Last updated ↑↓ |     |
|---------------------------------------|---------|---------------|---------|-----------------|-----|
| GENERAL                               | SEEKER  | A             | 194089  | 03-22-2023      |     |
| SKILLSOURCE - OTHELLO LEARNING CENTER | STAFF   | A             | 194090  | 03-22-2023      |     |
| SKILLSOURCE - OTHELLO LEARNING CENTER | TRAINER | Select status | 194091  | 03-22-2023      | ✓ ✕ |

Office Select option Role Select option Status Select option Add Role

Use the **Select Status** dropdown to select the new status and then click the check mark to register the change. But keep in mind that the database will not be changed until the blue **Save** button is clicked above.



# Casenotes

The image consists of two screenshots of a CMS interface. The top screenshot shows the 'PERSON TEST Details' page. On the left is a sidebar with a menu: Person, Attendance, Enrollment, Test, Workshop, Office, Business, Jobs, Contract, Reports, and Admin. The main content area has a header 'PERSON TEST Details' with a 'Google account:' field. Below this are tabs: Profile, Additional, Open Doors, Contact Info, and Roles/Groups. At the top right of the main area are buttons: 'Add Google Acct', 'Notes' (highlighted with a red box), 'Save', 'Cancel', and 'Delete'. The bottom screenshot shows the same interface but with a modal window open titled 'Case Notes for PERSON TEST'. The modal has a table with columns 'rep' and 'date'. Below the table is a text area for notes. At the top right of the modal are buttons: 'New' (highlighted with a red arrow), 'Cancel', and 'Save'. At the bottom of the modal are buttons: 'Save', 'Delete', 'Print', 'Select for Printing', 'Clear Text', and 'Close'.

The panel on the left lists all the case notes that have been added to this person record. If you want to add a new note, click the **New** button that you see on the top right. You will be able to confirm the date (defaults to the current date) which you can edit as needed. Then just type in your note in the Textarea provided. When finished click the **Save** button.

# Attendance

## Student Clock-In Screen

**ROSTOVA MASHA**  
**LOGOUT**  
minus [-] if not you  
**3:15 PM**  
Wednesday August 17 2022  
**IN** **OUT**  
LAST ACTION:out 04/13/2022 19:00 PM

Rostova has entered her CMS id number logging into the ClockIn/Out screen. When she clicks the IN button, an attendance record is created as shown below. It is highlighted in red because it is an “Open” record, meaning that there has yet to occur a Logout event.

CMS

Person

**Attendance**

Enrollment

Test

Workshop

Office

Business

AUTO: ON

Sticky Learner: ROSTOVA, MASHA (150386)

Welcome: LARRY

Attendance

Absence

Attendance

Show Filters

Log Time

Summarize

+ Add Attendance

Print/Export

Date Range:

08-17-2022

to

08-17-2022

Learner

All users

Run

Clear

| CMS ID | Last Name | First Name | Date       | IN      | OUT | Teacher       | Contact Type | Purpose     | Groups |
|--------|-----------|------------|------------|---------|-----|---------------|--------------|-------------|--------|
| 150386 | ROSTOVA   | MASHA      | 08-17-2022 | 3:21 PM | 0   | DONNA HEND... | Face to Face | Instruction |        |

Rostova is now clocking out

**ROSTOVA MASHA**  
**LOGOUT**  
minus [-] if not you  
**3:28 PM**  
Wednesday August 17 2022  
**IN** **OUT**  
LAST ACTION:out 08/17/2022 15:28 PM

Notice now the record is not highlighted in red and we see that there is an Out time recorded. This is called a “Closed” or completed attendance record.

The screenshot shows the CMS Attendance page. The left sidebar has a menu with 'Person', 'Attendance', 'Enrollment', 'Test', 'Workshop', and 'Office'. The 'Attendance' section is active. The top bar shows 'AUTO: ON' and 'Sticky Learner: ROSTOVA, MASHA (150386)'. The main area has tabs for 'Attendance' and 'Absence'. Below the tabs, there's a 'Date Range' filter set to '08-17-2022' to '08-17-2022'. A table lists attendance records. The first record is highlighted in red, indicating it's not closed. The second record, for Masha Rostova, is not highlighted and has an 'OUT' time of 3:28 PM, indicating it's a closed record.

| CMS ID | Last Name | First Name | Date       | IN      | OUT     | Teacher       | Contact Type | Purpose     | Groups |
|--------|-----------|------------|------------|---------|---------|---------------|--------------|-------------|--------|
| 150386 | ROSTOVA   | MASHA      | 08-17-2022 | 3:21 PM | 3:28 PM | DONNA HEND... | Face to Face | Instruction |        |

It is possible to edit the record by double clicking on the row. This will bring up the Entry/Edit dialog screen as shown below.

The screenshot shows the CMS Attendance page with the 'Edit Attendance Record' dialog box open. The dialog box has fields for 'Learner' (ROSTOVA, MASHA(150386)), 'Date' (08-17-2022), 'Time IN' (03:21 PM), and 'Time OUT' (03:28 PM). There are checkboxes for 'Open' and 'Homework (minutes)' (0). There are dropdowns for 'Instructor (hours)' (0) and 'Purpose' (Instruction). There are radio buttons for 'Session' (M, A, E, X) and 'Teacher' (DONNA HENDRICKSON). There is a dropdown for 'Contact Type' (Face to face). There is a text field for 'Note'. The 'Save' button is highlighted.

You can also add a new attendance record manually by clicking on the **+Add Attendance** button.

If you find that the clock-in screen is not working, the first thing you should do is reboot the machine you are using for student clock-in.

# Recording an Absence

The screenshot shows the CMS Attendance tab. A table lists attendance records with columns: CMS ID, Last Name, First Name, Date, IN, OUT, Teacher, Contact Type, Purpose, and Groups. A right-click menu is open over the record for Sophia Poltz (CMS ID 152221), with the option 'Update Last Clock-In Dates' highlighted.

| CMS ID | Last Name      | First Name       | Date       | IN      | OUT     | Teacher        | Contact Type | Purpose     | Groups                |
|--------|----------------|------------------|------------|---------|---------|----------------|--------------|-------------|-----------------------|
| 150769 | MCCLEES        | RUSSELL          | 10-05-2023 | 2:11 PM | 2:36 PM | MIKE DACEY     | Face to Face | Instruction | S2W, SPED, OPEND, ... |
| 152221 | POLTZ          | SOPHIA           | 10-05-2023 | 1:53 PM | 3:22 PM | MIKE DACEY     | Face to Face | Instruction | OPEND                 |
| 151496 | DAGGETT        | DAKOTA           | 10-05-2023 |         | 3:55 PM | MIKE DACEY     | Face to Face | Instruction | SPED, OPEND, ALE      |
| 152194 | CAMPBELL BAKER | ROXANNE (ROXY)   | 10-05-2023 |         | 2:00 PM | MIKE DACEY     | Face to Face | Instruction | OPEND                 |
| 150802 | MYERS SOLIS    | JORDAN           | 10-05-2023 |         | 3:05 PM | MIKE DACEY     | Face to Face | Instruction | OPEND                 |
| 151765 | EMERSON        | NATASHA          | 10-05-2023 |         | 2:15 PM | MIKE DACEY     | Face to Face | Instruction | OPEND, ALE            |
| 152227 | OSEGUERA       | AYDEN            | 10-05-2023 |         | 4:27 PM | MIKE DACEY     | Face to Face | Instruction | OPEND                 |
| 150336 | PARRA SEAMSTER | ALEXANDER (ALEX) | 10-05-2023 | 1:03 PM | 1:40 PM | DANA OSTERLUND | Face to Face | Instruction | S2W, SPED, OPEND      |

The user has clicked on an attendance record for Sophia Poltz.

The right-click menu has an item called “**Update Last Clock-In Dates**”. This option updates **every** student’s last clock-in date which is required for an accurate Roster report.

Just so happens that Sophia has one **Absence** record. The Absence tab displays **ALL** the absence records that are associated with the selected student for the selected date range.

Clicking the Absence tab displays a data grid and double-clicking the absence record brings up the following entry/edit dialog:

The screenshot shows the CMS Absence tab. A table lists absence records with columns: CMS ID, Last Name, First Name, Start Date, End Date, Excuse, and Excuse Note. An 'Edit Absence Record' dialog box is open, showing the details for the absence record for Sophia Poltz (CMS ID 152221). The dialog includes fields for Start Date, End Date, Excuse, and a Note field.

| CMS ID | Last Name | First Name | Start Date | End Date   | Excuse  | Excuse Note |
|--------|-----------|------------|------------|------------|---------|-------------|
| 152221 | POLTZ     | SOPHIA     | 10-03-2023 | 10-04-2023 | ILLNESS | Called in   |

You cannot enter an Absence in advance. You have to wait till the first day of the absence to do the data entry.

# Enrollment

**CMS** AUTO: ON Sticky Learner: PERSON, NEW (150387) Welcome: LARRY

**Enrollment**

PERSON, NEW (150387) [Get Enrollments](#) [+ Add Enrollment](#) [Print/Export](#) [⚙](#)

|   | Start Date ↑↓ | Exit Date ↑↓ | Age ↑↓ | BSD ↑↓ | G-GED ↑↓ | G-HSD ↑↓ | G-IC3 ↑↓ | Drop Date ↑↓ | Drop Code ↑↓ | Status ↑↓ |
|---|---------------|--------------|--------|--------|----------|----------|----------|--------------|--------------|-----------|
| ▼ | 06-08-2022    |              | 0      | Y      | N        | Y        | N        |              |              | A         |

**Outcomes** [+ Add Outcome](#) [Print/Export](#) [⚙](#)

| Outcome Date ↑↓ | Outcome Code | Outcome Description ↑↓            | Source ↑↓ | PYApplied ↑↓ | Credits ↑↓ | Notes ↑↓  |
|-----------------|--------------|-----------------------------------|-----------|--------------|------------|-----------|
| 06-24-2022      | CASM         | MATH FUNCTIONING LEVEL GAIN CASAS | SLH       | PY22         | 0.00       | This is a |
| 07-06-2022      | CASR         | READ FUNCTIONING LEVEL GAIN CASAS | SLH       | PY22         | 0.00       |           |

If Sticky Learner is set, as it is in this case, all the enrollment and outcome records will be displayed for that learner. **To clear the Sticky Learner click the red “x”.**

Let's set another sticky learner and then select the Enrollment Tab.

**CMS** AUTO: ON Sticky Learner: SINCLAIR, JORDAN (150579) Welcome: LARRY

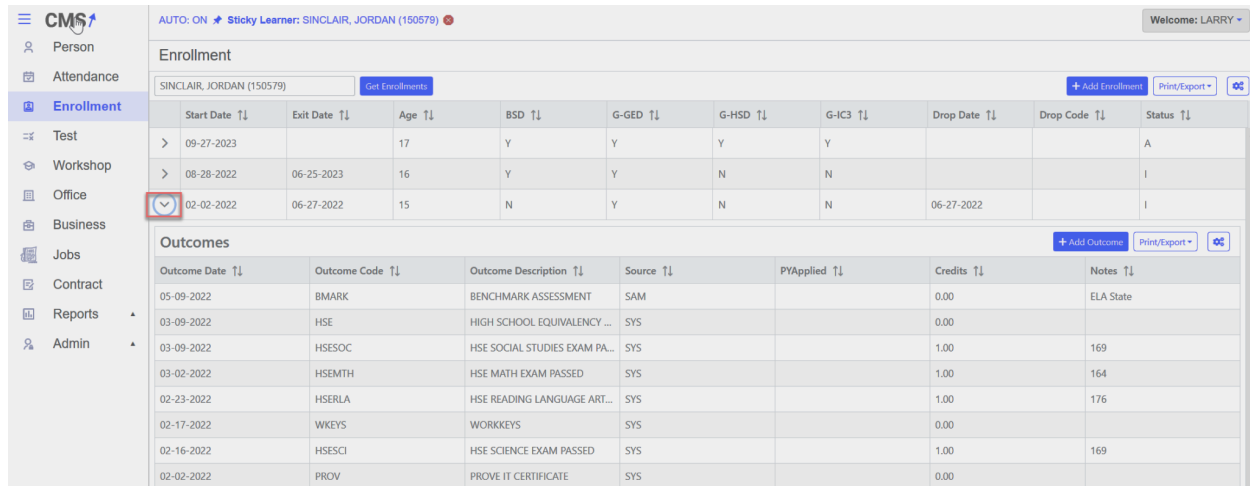
**Enrollment**

SINCLAIR, JORDAN (150579) [Get Enrollments](#) [+ Add Enrollments](#) [Print/Export](#) [⚙](#)

|   | Start Date ↑↓ | Exit Date ↑↓ | Age ↑↓ | BSD ↑↓ | G-GED ↑↓ | G-HSD ↑↓ | G-IC3 ↑↓ | Drop Date ↑↓ | Drop Code ↑↓ | Status ↑↓ |
|---|---------------|--------------|--------|--------|----------|----------|----------|--------------|--------------|-----------|
| > | 09-27-2023    |              | 17     | Y      | Y        | Y        | Y        |              |              | A         |
| > | 08-28-2022    | 06-25-2023   | 16     | Y      | Y        | N        | N        |              |              | I         |
| > | 02-02-2022    | 06-27-2022   | 15     | N      | Y        | N        | N        | 06-27-2022   |              | I         |

I will expand the last record:

## This UI is Different



**Enrollment**

| Start Date | Exit Date  | Age | BSD | G-GED | G-HSD | G-IC3 | Drop Date  | Drop Code | Status |
|------------|------------|-----|-----|-------|-------|-------|------------|-----------|--------|
| >          | 09-27-2023 | 17  | Y   | Y     | Y     | Y     |            |           | A      |
| >          | 08-28-2022 | 16  | Y   | Y     | N     | N     |            |           | I      |
| ▼          | 02-02-2022 | 15  | N   | Y     | N     | N     | 06-27-2022 |           | I      |

**Outcomes**

| Outcome Date | Outcome Code | Outcome Description           | Source | PYApplied | Credits | Notes     |
|--------------|--------------|-------------------------------|--------|-----------|---------|-----------|
| 05-09-2022   | BMARK        | BENCHMARK ASSESSMENT          | SAM    |           | 0.00    | ELA State |
| 03-09-2022   | HSE          | HIGH SCHOOL EQUIVALENCY ...   | SYS    |           | 0.00    |           |
| 03-09-2022   | HSESOC       | HSE SOCIAL STUDIES EXAM PA... | SYS    |           | 1.00    | 169       |
| 03-02-2022   | HSEMTM       | HSE MATH EXAM PASSED          | SYS    |           | 1.00    | 164       |
| 02-23-2022   | HSERLA       | HSE READING LANGUAGE ART...   | SYS    |           | 1.00    | 176       |
| 02-17-2022   | WKEYS        | WORKKEYS                      | SYS    |           | 0.00    |           |
| 02-16-2022   | HSESCI       | HSE SCIENCE EXAM PASSED       | SYS    |           | 1.00    | 169       |
| 02-02-2022   | PROV         | PROVE IT CERTIFICATE          | SYS    |           | 0.00    |           |

This UI is different in some notable ways. Outcomes are child records to Enrollment. Each Enrollment record may have one or more Outcomes. In all the other parts of the system where there is a one-to-many relationship, when you click on a parent record, you will see a tab at the top labeled after the name of the child table with a little number beside it. This number tells you how many child records there are, if any.



If you click on the Business, the number of Branches will show in the little blue circle and in order to see the branches you need to click on the Branches tab. Likewise, if you click on a Branch record, the Contracts tab will display how many contracts we have written with that branch.

Enrollments do not work like this. There is a little down icon outlined in red above. Clicking on this will open up a sub-table showing all the related outcomes. The screen shot above shows all the related Outcomes for the Enrollment record selected. Double-clicking on a row will bring up an entry/edit dialog for that record as shown on the next page.

## The Enrollment Entry/Edit Screen

The screenshot shows the CMS Enrollment Entry/Edit Screen. The interface includes a sidebar with navigation options: Person, Attendance, Enrollment, Test, Workshop, Office, Business, Jobs, Contract, Reports, and Admin. The main area displays an 'Enrollment' table for 'SINCLAIR, JORDAN (150579)'. A red box highlights the enrollment record with Start Date '02-02-2022' and Exit Date '06-27-2022'. A red arrow points from this record to the 'Edit Enrollment Record' modal window. The modal contains the following fields and options:

- Start Date: 02-02-2022
- Exit Date: 06-27-2022
- Age at Start: 15 recalc
- INPR?: ☒ Yes ☐ No
- BSkill Deficient?: ☐ Yes ☒ No
- GED Goal?: ☒ Yes ☐ No
- HSD Goal?: ☐ Yes ☒ No
- IC3 Goal?: ☐ Yes ☒ No
- Drop Date: 06-27-2022
- Drop Reason: GED
- Exclude: Select Exclude
- Select Program: WENS
- Select Group: ALE
- Record Status: ☐ Active ☒ Inactive

The modal has 'Save' and 'Cancel' buttons at the bottom.

The enrollment record allows us to track program participation over time. Many of our participants have been with us for many years. Some unexpected circumstance may cut a participation short and we may not see them again until many months later. We will end the first enrollment and create a new enrollment record when they return. All that they achieve while with us is captured in the **Enrollment Outcomes** screen. Every outcome is associated with an enrollment record.

# The Outcome Entry/Edit Screen

The Outcome table allows us to record the positive things that are achieved while a participant is with us. The three radio buttons near the top determine what Outcome codes will be available in the Outcome Code drop-down list right below. There are many possible outcomes:

## CC Activity: Career Competency Activity

|                |                                     |
|----------------|-------------------------------------|
| <b>APPR</b>    | APPRENTICESHIP                      |
| <b>CMLEVEL</b> | CM LEVEL CHANGE                     |
| <b>EMPL</b>    | EMPLOYMENT                          |
| <b>HSD</b>     | HSD DIPLOMA EARNED                  |
| <b>HSE</b>     | HIGH SCHOOL EQUIVALENCY EXAM PASSED |
| <b>IC3</b>     | IC3 CERTIFICATION                   |
| <b>ICRED</b>   | INDUSTRY RECOGNIZED CREDENTIAL      |
| <b>JOBSCO</b>  | JOB CORPS                           |
| <b>MCAA</b>    | MCAS ACCESS CERTIFICATION           |
| <b>MCAE</b>    | MCAS EXCEL CERTIFICATION            |
| <b>MCAO</b>    | MCAS OUTLOOK CERTIFICATION          |
| <b>MCAP</b>    | MCAS POWERPOINT CERTIFICATION       |
| <b>MCAW</b>    | MCAS WORD CERTIFICATION             |
| <b>MILIT</b>   | MILITARY                            |
| <b>MOA</b>     | MOS ACCESS CERTIFICATION            |
| <b>MOE</b>     | MOS EXCEL CERTIFICATION             |
| <b>MOEX</b>    | MOS EXCEL EXPERT CERTIFICATION      |
| <b>MOO</b>     | MOS OUTLOOK CERTIFICATION           |
| <b>MOP</b>     | MOS POWERPOINT CERTIFICATION        |
| <b>MOW</b>     | MOS WORD CERTIFICATION              |
| <b>MOWX</b>    | MOS WORD EXPERT CERTIFICATION       |
| <b>NOEX</b>    | EXCLUDED FROM RETENTION MEASURE     |
| <b>NONE</b>    | NO RETENTION OUTCOME                |
| <b>OTHER</b>   | OTHER PRE-APPROVED CREDENTIAL       |
| <b>PROV</b>    | PROVE IT CERTIFICATE                |
| <b>PSED</b>    | POST-SECONDARY ED                   |
| <b>RESC</b>    | REENTERED HIGH SCHOOL/COLLEGE ABE   |
| <b>STCRED</b>  | ST CREDENTIAL                       |
| <b>WKEYS</b>   | WORKKEYS                            |
| <b>WKEYS-G</b> | WORKKEYS GOLD                       |

## Map: Measure of Academic Progress

|                |                                       |
|----------------|---------------------------------------|
| <b>BMARK</b>   | BENCHMARK ASSESSMENT                  |
| <b>CASM</b>    | MATH FUNCTIONING LEVEL GAIN CASAS     |
| <b>CASM3</b>   | CASAS MATH 3 POINT GAIN               |
| <b>CASM5</b>   | CASAS MATH 5 POINT GAIN               |
| <b>CASR</b>    | READ FUNCTIONING LEVEL GAIN CASAS     |
| <b>CASR3</b>   | CASAS READING 3 POINT GAIN            |
| <b>CASR5</b>   | CASAS READING 5 POINT GAIN            |
| <b>CENROLL</b> | COLLEGE ENROLLMENT                    |
| <b>CREADY</b>  | COLLEGE READINESS COURSEWORK          |
| <b>CREDIT</b>  | REDITS EARNED                         |
| <b>GEDMATH</b> | GED MATH EXAM PASSED                  |
| <b>GEDRLA</b>  | GED READING LANGUAGE ARTS EXAM PASSED |
| <b>GEDSCI</b>  | GED SCIENCE EXAM PASSED               |
| <b>GEDSOC</b>  | GED SOCIAL STUDIES EXAM PASSED        |
| <b>HSEMTH</b>  | HSE MATH EXAM PASSED                  |
| <b>HSERLA</b>  | HSE READING LANGUAGE ARTS EXAM PASSED |
| <b>HSESCI</b>  | HSE SCIENCE EXAM PASSED               |
| <b>HSESOC</b>  | HSE SOCIAL STUDIES EXAM PASSED        |
| <b>ICRED</b>   | INDUSTRY RECOGNIZED CREDENTIAL (IAP)  |
| <b>PHSEMT5</b> | PRE HSE MATH 5 POINT GAIN             |
| <b>PHSEMTH</b> | PRE HSE MATH TEST PASSED              |
| <b>PHSERL5</b> | PRE HSE RLA 5 POINT GAIN              |
| <b>PHSERLA</b> | PRE HSE READING TEST PASSED           |
| <b>PHSESC5</b> | PRE HSE SCIENCE 5 POINT GAIN          |
| <b>PHSESCI</b> | PRE HSE SCIENCE TEST PASSED           |
| <b>PHSESOC</b> | PRE HSE SOCIAL STUDIES TEST PASSED    |
| <b>PHSESS5</b> | PRE HSE SOCIAL STUDIES 5 POINT GAIN   |
| <b>PROVEIT</b> | PROVE IT GAIN                         |
| <b>STCREDM</b> | SHORT TERM CREDENTIAL (IAP)           |
| <b>TRLEVEL</b> | TRANSITION TO HIGHER LEVEL COURSEWORK |
| <b>WKGAIN</b>  | WORKKEYS LEVEL GAIN                   |
| <b>WKLERN</b>  | WORK-BASED LEARNING EXPERIENCE        |
| <b>WREADY</b>  | WORK READINESS TRAINING               |



## **Outcome: Other General Outcomes**

|                |                                 |
|----------------|---------------------------------|
| <b>APPREN</b>  | APPRENTICESHIP                  |
| <b>BUSINT</b>  | BUSINESS INTERNSHIP             |
| <b>COOPWSL</b> | COOPERATIVE WORKSITE LEARNING   |
| <b>INSTWSL</b> | INSTUTIONAL WORKSITE LEARNING   |
| <b>OTHCCL</b>  | OTHER CAREER CONNECTED LEARNING |
| <b>PREAPRN</b> | PRE-APPRENTICESHIP              |
| <b>VBUSINT</b> | VIRTUAL BUSINESS INTERNSHIP     |

# Office

## Office Detail

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Active

+ Add New Office

SKILLSOURCE - MOSES LAKE SSML

SKILLSOURCE - WENATCHEE SS

WORKSOURCE - OKANOGAN WSOK

CHELAN COUNTY JUVENILE DETENTION SCHOOL CCJDS

SKILLSOURCE - OTHELLO LEARNING CENTER SSOLC

SKYWARD SKWD

GENERAL GENERAL

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

SKILLSOURCE - WENATCHEE

Office DetailStaff PeopleOffice roomsCourses

SKILLSOURCE - WENATCHEE

+ Edit Office

Record #10

Office NameSKILLSOURCE - WENATCHEE

Short NameSS

Emailshannon@skillsource.org

Learner ProgramWenatchee School District

Referral RouterShannon Scott (downstairs), Gloria Hallead (upstairs classroom)

Orientation InfoOrientation meetings on Thursdays: Adults - 1:30pm; Youth - 3:00pm (No appointments necessary)

Address234 N Mission

CityWENATCHEE

StateWA

RegionChelan County

Zip98807

Phone5096633091

Fax5096635649

Invoice AddressUse above address

StatusActive

All staff are associated with one or more **Offices**. Many of the drop-down selections throughout the application are constrained to the office of the logged-in user.

## Office Staff

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Groups

Fund

Programs

Activity

Active

+ Add New Office

SKILLSOURCE - MOSES LAKE SSML

SKILLSOURCE - WENATCHEE SS

WORKSOURCE - OKANOGAN WSOK

CHELAN COUNTY JUVENILE DETENTION SCHOOL CCJDS

SKILLSOURCE - OTHELLO LEARNING CENTER SSOLC

SKYWARD SKWD

GENERAL GENERAL

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

SKILLSOURCE - WENATCHEE

Office DetailStaff PeopleOffice roomsCourses

Staff people

+ Add Staff

Print/Export

| CMS ID | Last Name   | First Name | Status |
|--------|-------------|------------|--------|
| 150386 | ROSTOVA     | MASHA      | A      |
| 150387 | PERSON      | NEW        | A      |
| 5101   | HENDERSON   | LARRY      | A      |
| 27221  | HENDERSON   | RENEE      | A      |
| 143136 | OLSEN       | NOAH       | A      |
| 149340 | WARREN      | KATHY      | A      |
| 40140  | STRONG      | THERESA    | A      |
| 149814 | OSTERLUND   | RYAN       | A      |
| 136992 | SCHRECK     | LARRY      | A      |
| 141899 | BOBBITT     | AMANDA     | A      |
| 33279  | LAMERS      | HEIDI      | A      |
| 148287 | HENDRICKSON | DONNA      | A      |

Items 1 to 20 of 39 | K < > > Go to page: 1 / 2

# Office Rooms

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Groups

Fund

Programs

Activity

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Active

+ Add New Office

SKILLSOURCE - MOSES LAKE SSML

SKILLSOURCE - WENATCHEE SS

WORKSOURCE - OKANOGAN WSOK

CHELAN COUNTY JUVENILE DETENTION SCHOOL CCJDS

SKILLSOURCE - OTHELLO LEARNING CENTER SSOLC

SKYWARD SKWD

GENERAL GENERAL

SKILLSOURCE - WENATCHEE

Office Detail Staff People Office rooms Courses

Office Rooms

+ Add Room Print/Export

| Room ID | Room Code | Capacity | Location                | Description          | Status |
|---------|-----------|----------|-------------------------|----------------------|--------|
| 107     | VR-CD     | 100      | Virtual Room            | Virtual Workshop     | A      |
| 105     | HO-K      | 1        | HOUSE KITCHEN           |                      | A      |
| 99      | CU290     | 1        | SLC BACK HALLWAY        |                      | A      |
| 97      | DISPOSED  | 10       | DISPOSED SURPLUS...     | 7/2018 ITEMS THAT... | A      |
| 96      | HOLDING   | 10       | VARIES -- PENDNG ...    | 7/2018 HOLDING P...  | A      |
| 93      | CU130     | 1        | Supply Room             |                      | A      |
| 92      | CU285     | 1        | Staff Office            |                      | A      |
| 91      | NO314     | 1        | Staff Office Noyd bl... |                      | A      |
| 77      | HO203     | 1        | Staff Office            |                      | A      |
| 76      | HO202     | 1        | Staff Office            |                      | A      |
| 75      | HO201     | 1        | Staff Office            |                      | A      |
| 74      | HO200     | 10       | House Living Room       |                      | A      |

Items 1 to 20 of 49

Go to page: 1 / 3

# Office Courses

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Groups

Fund

Programs

Activity

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Active

+ Add New Office

SKILLSOURCE - MOSES LAKE SSML

SKILLSOURCE - WENATCHEE SS

WORKSOURCE - OKANOGAN WSOK

CHELAN COUNTY JUVENILE DETENTION SCHOOL CCJDS

SKILLSOURCE - OTHELLO LEARNING CENTER SSOLC

SKYWARD SKWD

GENERAL GENERAL

SKILLSOURCE - WENATCHEE

Office Detail Staff People Office rooms Courses

Courses

+ Add Course Manage Categories Print/Export

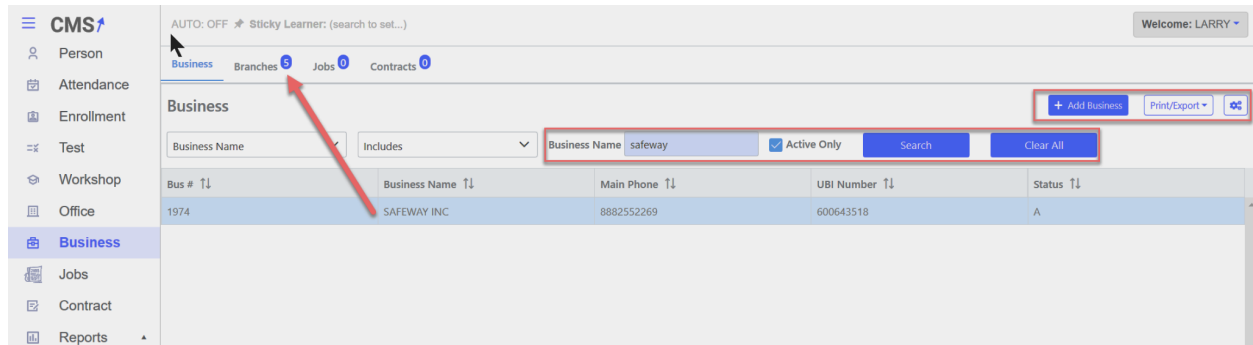
| Code  | Category | Title               | Instructor     | Description          | Min Sign-up | Max Sign-up |
|-------|----------|---------------------|----------------|----------------------|-------------|-------------|
| 503   | WKS      | 503 Grant Works...  | STAFF MEMBER   | This "course" res... | 1           | 123456      |
| ACE1  | WKS      | Action For Caree... | STAFF MEMBER   | Assessment for ...   | 5           | 30          |
| ACE2  | WKS      | Assessment Acti...  | STAFF MEMBER   | Assessments, co...   | 1           | 50          |
| ACT   | WKS      | ACT Youth Work...   | CHRISTY MATAYA |                      | 1           | 24          |
| ASVAB | TST      | METS ASVAB Tes...   | THERESA STRONG | Room reserved f...   | 1           | 12          |
| BCOM1 | CWS      | Basic Computer ...  | LORRIE DUNCAN  | Using computer...    | 3           | 12          |
| BCOM2 | CWS      | Basic Computer 2    | LORRIE DUNCAN  | Advanced comp...     | 3           | 12          |
| CDEV  | WKS      | * ACT Youth Wor...  | CHRISTY MATAYA |                      | 1           | 25          |
| CDEV1 | WKS      | Career Develop...   | CHRISTY MATAYA | It is not enough ... | 1           | 15          |
| CDEV2 | WKS      | Job Search Tool...  | STAFF MEMBER   |                      | 1           | 20          |
| CDEV3 | WKS      | Career Planning     | STAFF MEMBER   |                      | 1           | 20          |
| CDEV5 | WKS      | Job Search Tool...  | LORRIE DUNCAN  |                      | 5           | 20          |

Items 1 to 20 of 120

Go to page: 1 / 6

# Business

Let's search for the business **Safeway**.

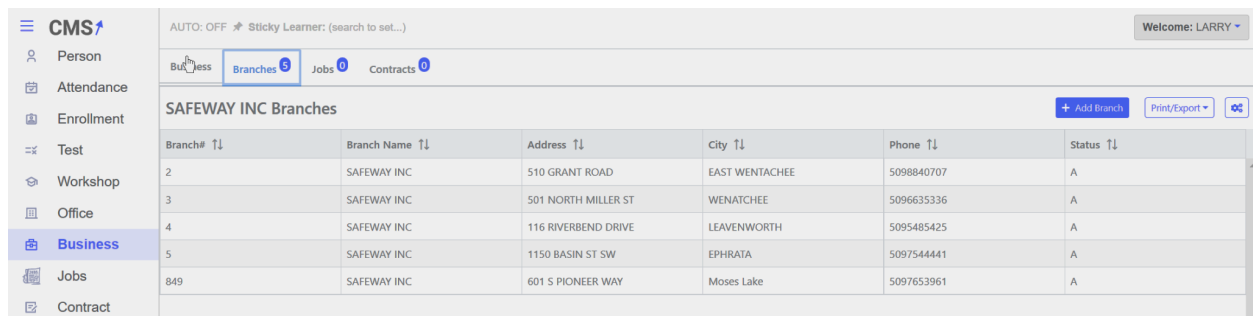


The screenshot shows the CMS interface with the 'Business' tab selected. A search for 'safeway' is performed, and the results table shows one entry for 'SAFEWAY INC' with 5 branches. A red arrow points to the 'Branches 5' count next to the 'Business' tab.

| Bus # | Business Name | Main Phone | UBI Number | Status |
|-------|---------------|------------|------------|--------|
| 1974  | SAFEWAY INC   | 8882552269 | 600643518  | A      |

Notice the red arrow above. If a business has branches the branch count will appear in the small blue circle that is part of the Branch tab when you select (single click) a business. This is the only visual clue that branch records exist.

But if you select the Branch tab you will see the following screen displaying all the associated Safeway branches:



The screenshot shows the CMS interface with the 'Branches 5' tab selected. The results table shows 5 branches for 'SAFEWAY INC'.

| Branch # | Branch Name | Address             | City           | Phone      | Status |
|----------|-------------|---------------------|----------------|------------|--------|
| 2        | SAFEWAY INC | 510 GRANT ROAD      | EAST WENTACHEE | 5098840707 | A      |
| 3        | SAFEWAY INC | 501 NORTH MILLER ST | WENATCHEE      | 5096635336 | A      |
| 4        | SAFEWAY INC | 116 RIVERBEND DRIVE | LEAVENWORTH    | 5095485425 | A      |
| 5        | SAFEWAY INC | 1150 BASIN ST SW    | EPHRATA        | 5097544441 | A      |
| 849      | SAFEWAY INC | 601 S PIONEER WAY   | Moses Lake     | 5097653961 | A      |

If you click ONCE on a branch record (row) you will see the Jobs tab and the Contracts tab display the number of Jobs and/or the number of contracts that are directly associated with that business branch.

Double clicking on any row in the Branches grid will bring up the entry/edit dialog for that selected record. The following is the Branch entry/edit dialog:

**SAFEWAY INC-details**

Business Number: 1974      Branch Number: 3

Staff Person: RYAN OSTERLUND

Branch Name: SAFEWAY INC

Physical Address: 501 NORTH MILLER ST

City: WENATCHEE      State: WA      Zip: 98801

Mail Address: 501 NORTH MILLER ST      ☐ Same

City: WENATCHEE      State: WA      Zip: 98801

County: Chelan County

Branch Phone: 5096635336      Fax Number:

Notes on this entry/edit dialog:

The Staff Person dropdown should display the staff who is the primary contact for that business. If the staff person is not on the list please select **Staff Member** from the list.

For multi-branch businesses, it is often helpful to include some location data with the Branch Name. For example, the name here could be **SAFEWAY - MILLER STREET**.

**SAFEWAY INC-details**

Manager Name:      Cell Phone: 0

Email Address:      Website Address:

UBI Number: 600643518      FEIN Code: 94-0826454

[Search UBI Number](#)

Vendor Number: 6635336

Total Employees: 0      Total Training Positions: 0

Total Contracts: 0      Total Positive Outcomes: 0

Employer/Provider: ☒ Employer   ☐ Provider   ☐ Both

Status: ☒ Active   ☐ Inactive   ☐ Deleted

Third-Party Payers: ☐ Yes   ☒ No

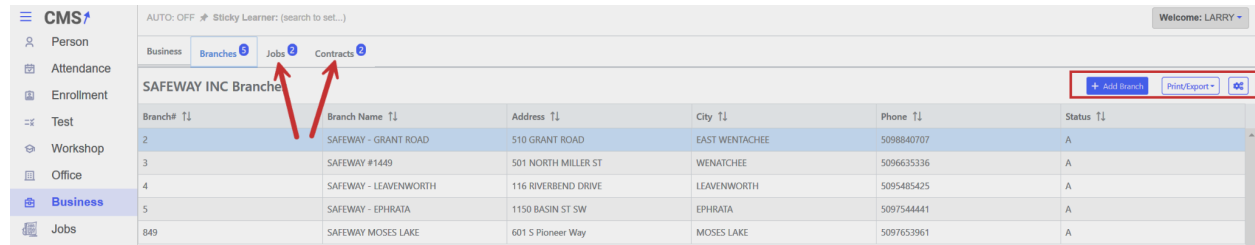
**Total Employees:** This is an optional data element but good to record here if you can get it.

**Total Training Positions:** This is also optional.

**Total Contracts:** Eventually this will be automatically updated by the system whenever a new contract is created.

**Total Positive Outcomes:** This will also be automatically updated whenever a decision is made about what constitutes a positive outcome.

Clicking the **Jobs** tab display all the associated jobs



AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Business Branches 0 Jobs 0 Contracts 0

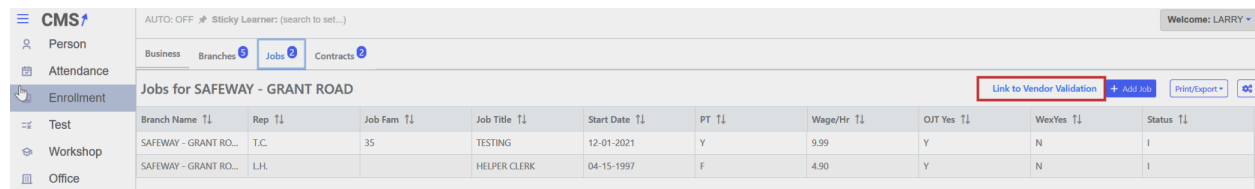
SAFEWAY INC Branche

+ Add Branch Print/Export 00

| Branch# T↓ | Branch Name T↓        | Address T↓          | City T↓        | Phone T↓   | Status T↓ |
|------------|-----------------------|---------------------|----------------|------------|-----------|
| 2          | SAFEWAY - GRANT ROAD  | 510 GRANT ROAD      | EAST WENTACHEE | 5098840707 | A         |
| 3          | SAFEWAY #1449         | 501 NORTH MILLER ST | WENATCHEE      | 5096635336 | A         |
| 4          | SAFEWAY - LEAVENWORTH | 116 RIVERBEND DRIVE | LEAVENWORTH    | 5095485425 | A         |
| 5          | SAFEWAY - EPHRATA     | 1150 BASIN ST SW    | EPHRATA        | 5097544441 | A         |
| 849        | SAFEWAY MOSES LAKE    | 601 S Pioneer Way   | MOSES LAKE     | 5097653961 | A         |

Double clicking a row will bring up an Entry/Edit dialog.

Active openings have an Active status.



AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Business Branches 0 Jobs 0 Contracts 0

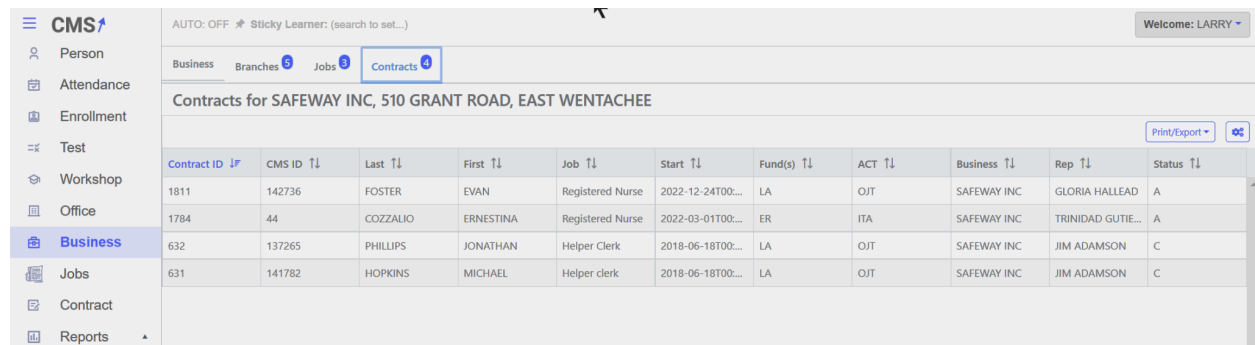
Jobs for SAFEWAY - GRANT ROAD

Link to Vendor Validation + Add Sub Print/Export 00

| Branch Name T↓        | Rep T↓ | Job Fam T↓ | Job Title T↓ | Start Date T↓ | PT T↓ | Wage/Hr T↓ | OJT Yes T↓ | WexYes T↓ | Status T↓ |
|-----------------------|--------|------------|--------------|---------------|-------|------------|------------|-----------|-----------|
| SAFEWAY - GRANT RO... | T.C.   | 35         | TESTING      | 12-01-2021    | Y     | 9.99       | Y          | N         | I         |
| SAFEWAY - GRANT RO... | L.H.   |            | HELPER CLERK | 04-15-1997    | F     | 4.90       | Y          | N         | I         |

Double clicking a row will bring up an Entry/Edit dialog. Notice that the Jobs screen has a link to the Vendor Validation document.

Clicking the Contracts tab displayed all the contracts that have been generated for this employer.



AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Business Branches 0 Jobs 0 Contracts 0

Contracts for SAFEWAY INC, 510 GRANT ROAD, EAST WENTACHEE

Print/Export 00

| Contract ID T↓ | CMS ID T↓ | Last T↓  | First T↓  | Job T↓           | Start T↓          | Fund(s) T↓ | ACT T↓ | Business T↓ | Rep T↓            | Status T↓ |
|----------------|-----------|----------|-----------|------------------|-------------------|------------|--------|-------------|-------------------|-----------|
| 1811           | 142736    | FOSTER   | EVAN      | Registered Nurse | 2022-12-24T00:... | LA         | OJT    | SAFEWAY INC | GLORIA HALLEAD    | A         |
| 1784           | 44        | COZZALIO | ERNESTINA | Registered Nurse | 2022-03-01T00:... | ER         | ITA    | SAFEWAY INC | TRINIDAD GUTIE... | A         |
| 632            | 137265    | PHILLIPS | JONATHAN  | Helper Clerk     | 2018-06-18T00:... | LA         | OJT    | SAFEWAY INC | JIM ADAMSON       | C         |
| 631            | 141782    | HOPKINS  | MICHAEL   | Helper clerk     | 2018-06-18T00:... | LA         | OJT    | SAFEWAY INC | JIM ADAMSON       | C         |

Double clicking a row will bring up an Entry/Edit dialog.

**New Business**

Business Number  
0

Business Name  
ABC AUTO REPAIR

Business Type  
Private For-Profit

Main Phone  
5091234567

UBI Number  
900900800  
[Search UBI Number](#)

NAICS Code

☒ Active ☐ Inactive ☐ Deleted

Save Cancel

Clicking the New Business button brings up this Entry/Edit dialog. All the fields are required except the NAICS Code.

When you click “Save” the new record will appear as a top row in the grid. Single click on the new row and then click on the Branches tab in order to create a new branch record.

| Bus # | Business Name   | Main Phone | UBI Number | Status |
|-------|-----------------|------------|------------|--------|
| 10445 | ABC AUTO REPAIR | 5091234567 | 900900800  | A      |
| 10444 | M1RACLEFUN      | 9812347    | 4819238    | A      |

| Business Name  | Main Phone | UBI Number | Status |
|----------------|------------|------------|--------|
| Business #     |            |            |        |
| Branch #       |            |            |        |
| Business Phone |            |            |        |
| Branch Phone   |            |            |        |
| UBI Number     |            |            |        |

# The Business Grid Tabs

The screenshot shows the CMS interface with the Business Grid. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop, Office, Business (selected), and Jobs. The top header includes 'AUTO: OFF', 'Sticky Learner: (search to set...)', and 'Welcome: LARRY'. The Business Grid tabs are Business, Branches (0), Jobs (0), and Contracts (0). The main content area displays the Business Grid with a search bar and a table of records.

| Bus # | Business Name | Main Phone | UBI Number | Status |
|-------|---------------|------------|------------|--------|
| 1974  | SAFEWAY INC   | 8882552269 | 600643518  | A      |

Notice what happens when you click on a Business record

The screenshot shows the CMS interface with the Business Grid. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop, Office, Business (selected), and Jobs. The top header includes 'AUTO: OFF', 'Sticky Learner: (search to set...)', and 'Welcome: LARRY'. The Business Grid tabs are Business, Branches (5), Jobs (0), and Contracts (0). A red arrow points to the Branches tab. The main content area displays the Business Grid with a search bar and a table of records.

| Bus # | Business Name | Main Phone | UBI Number | Status |
|-------|---------------|------------|------------|--------|
| 1974  | SAFEWAY INC   | 8882552269 | 600643518  | A      |

When clicking on the Branches tab the following list of branches is displayed.

The screenshot shows the CMS interface with the Branches Grid. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop, Office, Business (selected), and Jobs. The top header includes 'AUTO: OFF', 'Sticky Learner: (search to set...)', and 'Welcome: LARRY'. The Branches Grid tabs are Business, Branches (5), Jobs (0), and Contracts (0). A red arrow points to the Branches tab. The main content area displays the Branches Grid with a search bar and a table of records.

| Branch# | Branch Name | Address             | City           | Phone      | Status |
|---------|-------------|---------------------|----------------|------------|--------|
| 2       | SAFEWAY INC | 510 GRANT ROAD      | EAST WENTACHEE | 5098840707 | A      |
| 3       | SAFEWAY INC | 501 NORTH MILLER ST | WENATCHEE      | 5096635336 | A      |
| 4       | SAFEWAY INC | 116 RIVERBEND DRIVE | LEAVENWORTH    | 5095485425 | A      |
| 5       | SAFEWAY INC | 1150 BASIN ST SW    | EPHRATA        | 5097544441 | A      |
| 849     | SAFEWAY INC | 601 S PIONEER WAY   | Moses Lake     | 5097653961 | A      |

Notice what happens when you click on a Branch record

The screenshot shows the CMS interface with the Branches Grid. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop, Office, Business (selected), and Jobs. The top header includes 'AUTO: OFF', 'Sticky Learner: (search to set...)', and 'Welcome: LARRY'. The Branches Grid tabs are Business, Branches (5), Jobs (3), and Contracts (4). A red arrow points to the Jobs tab. The main content area displays the Branches Grid with a search bar and a table of records.

| Branch# | Branch Name | Address             | City           | Phone      | Status |
|---------|-------------|---------------------|----------------|------------|--------|
| 2       | SAFEWAY INC | 510 GRANT ROAD      | EAST WENTACHEE | 5098840707 | A      |
| 3       | SAFEWAY INC | 501 NORTH MILLER ST | WENATCHEE      | 5096635336 | A      |
| 4       | SAFEWAY INC | 116 RIVERBEND DRIVE | LEAVENWORTH    | 5095485425 | A      |
| 5       | SAFEWAY INC | 1150 BASIN ST SW    | EPHRATA        | 5097544441 | A      |
| 849     | SAFEWAY INC | 601 S PIONEER WAY   | Moses Lake     | 5097653961 | A      |



## Adding A New Business Record

The screenshot shows a 'New Business' form with the following fields: Business Number (containing '0'), Business Name (text input), Business Type (dropdown menu), Main Phone (text input), UBI Number (text input), and NAICS Code (text input). Below the NAICS Code field are three radio buttons: Active (selected), Inactive, and Deleted. At the bottom are 'Save' and 'Cancel' buttons. A red rectangular box highlights the Business Name, Business Type, Main Phone, and UBI Number fields. A blue arrow points from the explanatory text on the right to the Business Number field.

These 4 pieces of information are required to create a new Business record. The Business Number is auto assigned by the database and the NAICS Code is optional. The Name, Phone and UBI are enforced unique by the database.

This is a close-up of the 'Business Type' dropdown menu. The menu is open, showing three options: 'Private Non-Profit', 'Private For-Profit', and 'Public (Government Funded)'. The dropdown is titled 'Select Business Type'.

Most of the time there will only be one Business record and one Branch record. But in the case of a multi-branch business, there can be any number of branches tied to a single Business record. The business name, phone and UBI number are automatically copied to the branch record when the branch record is created.

### Why is this important?

1. The unique fields help us prevent duplicate records. Before we create a new record we attempt to find an existing record by one or more of these fields. If those searches fail we know we can create a new record with confidence.
2. The UBI number is our verification and documentation that the business is operating legally in the State of Washington.

**Data Entry Tip:** We can copy the Main Phone and UBI from another source and simply paste them one at a time into the form above. During the Paste process all of the special characters will be stripped from the values leaving just the numbers. The () and - or . characters in phone numbers will be removed and the typical - in UBI numbers will also be removed.

# Business Branch

**New branch details**

Business Number: 10445 Branch Number: 0

Staff Person: Select SS Staff Contact

Branch Name: ABC AUTO REPAIR

Physical Address:

City: State: Zip:

Mail Address: Same:

City: State: Zip:

County: Select County

Branch Phone: 5091234567 Fax Number:

Manager Name: Cell Phone:

Email Address: Website:

UBI Number: 900900800 FEIN Code: 0

Vendor Number:

Total Employees: 0 Total Training Positions: 0

Total Contracts: 0 Total Positive Outcomes: 0

Employer/Provider: ☒ Employer ☐ Provider ☐ Both

Status: ☒ Active ☐ Inactive ☐ Deleted

Third-Party Payers: ☒ Yes ☐ No

Save Cancel

Click the New Branch button to enter branch details. The items highlighted in yellow are brought down from the business record as defaults. It is recommended, when entering multi-branch records, that you include some location information in the Name. You will be required to enter the Staff assigned and the address information at a minimum. If the Staff person is not on the list just use Staff Member. The County field is required.

**New branch details**

County: Chelan County

Branch Phone: 5091234567 Fax Number:

Manager Name: Cell Phone:

Email Address: Website:

UBI Number: 900900800 FEIN Code: 0

Vendor Number:

Total Employees: 0 Total Training Positions: 0

Total Contracts: 0 Total Positive Outcomes: 0

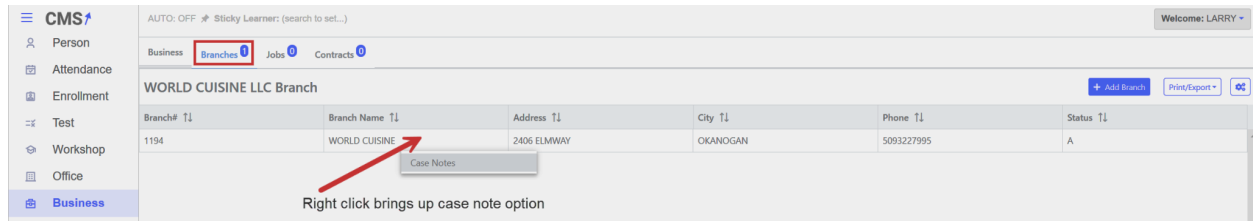
Employer/Provider: ☒ Employer ☐ Provider ☐ Both

Status: ☒ Active ☐ Inactive ☐ Deleted

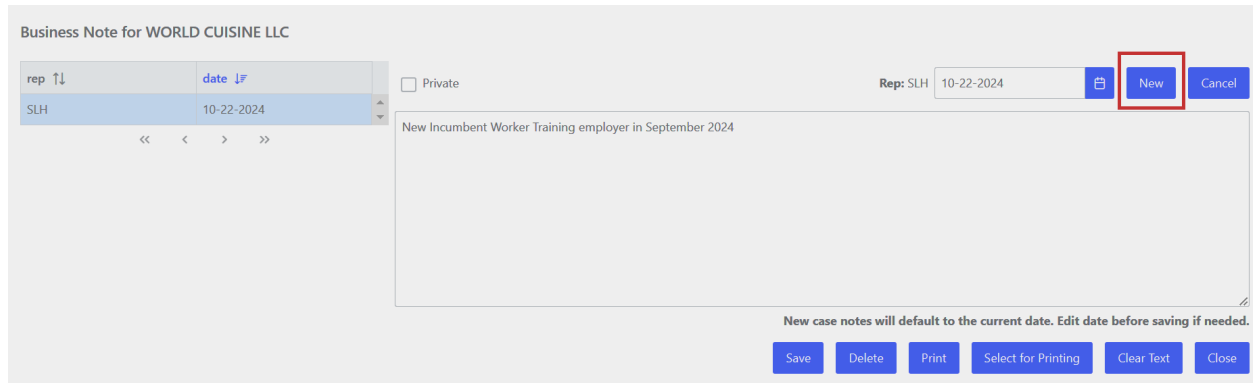
Third-Party Payers: ☒ Yes ☐ No

Save Cancel

## Adding A Business Branch Case Note



Casenotes can only be added to a Branch record. When you click the Case Notes option you will see the following screen:



The panel on the left lists all the case notes that have been added to this business branch record. If you want to add a new note, click the **New** button that you see on the top right. You will be able to confirm the date (defaults to the current date) which you can edit as needed. Then just type in your note in the Textarea provided. When finished click the **Save** button.

# How To Add a New Multi-Branch Business

**Example of a multi-branch business:** (to illustrate what we mean by Business Branch)

*Those who create new business/branch records may need to do a little research. This is important not only to prevent duplicate records but also to support the CMS contracting system, which depends on accurate business branch records.*

## **AUT TO MOCHA INC**

UBI (Uniform Business Identifier) **601-981-772** ([UBI Lookup Link](#))

Phone:

**(509) 664-8042**

NAICS(North American Industry Classification System)(Optional)

**722515** ([NAICS Lookup Link](#))

Address: (see branch locations below)

The following mailing address may be included in each branch record.

**524 S MISSION ST (Mailing)**

**WENATCHEE WA 98801-3048**

Locations: (Branches) The branch name should include some location information

- **Aut To Mocha (1355 Fifth)** - 1355 Fifth St, Wenatchee, WA 98801 - (509) 664-8042
- **Aut To Mocha (407 Fifth)** - 407 Fifth St, Wenatchee, WA 98801 - (509) 667-9189
- **Aut To Mocha (536 Mission)** - 536 S Mission St, Wenatchee, WA 98801 - (509) 664-6660
- **Aut To Mocha (220 Grant)** - 220 Grant Rd, East Wenatchee, WA 98802 - (509) 886-2229
- **Aut To Mocha (725 Grant)** - 725 Grant Rd, East Wenatchee, WA 98802 - (509) 881-2623
- **Aut-To Mocha (603 Cotlets)** - 603 Cotlets Way, Cashmere, WA 98815 - (509) 782-4289

The following pages list the current multi-branch business in the database.

## Examples of Multi-Branch Businesses

| <i>businessID</i> | <i>businessName</i>                       | <i>branchID</i> | <i>branchName</i>                     |
|-------------------|---|-----------------|---------------------------------------|
| 70                | CITY OF WENATCHEE                         | 430             | CITY OF WENATCHEE - MAIN OFFICE       |
|                   |   | 431             | PARKS AND RECREATION                  |
|                   |   | 432             | PUBLIC LIBRARY                        |
|                   |   | 433             | PUBLIC WORKS DEPARTMENT               |
| 86                | WENATCHEE VALLEY COLLEGE                  | 340             | WENATCHEE VALLEY COLLEGE              |
|                   |   | 406             | WENATCHEE VALLEY COLLEGE-OMAK         |
| 90                | EAGLE TRANSFER CO                         | 296             | EAGLE ADMIN SERVICES                  |
|                   |   | 600             | EAGLE TRANSFER CO                     |
| 97                | OMAK PUBLIC LIBRARY                       | 278             | OMAK PUBLIC LIBRARY                   |
|                   |   | 665             | TONASKET PUBLIC LIBRARY               |
| 102               | WENATCHEE SCHOOL DISTRICT #246            | 196             | WENATCHEE HIGH SCHOOL                 |
|                   |   | 617             | WENATCHEE SCHOOL DISTRICT             |
| 183               | CITY OF MOSES LAKE                        | 593             | CITY OF MOSE LAKE                     |
|                   |   | 1114            | MOSES LAKE MUSEUM AND ART CENTER      |
| 186               | JR SIMPLOT CO                             | 570             | JR SIMPLOT                            |
|                   |   | 687             | JR SIMPLOT CO                         |
| 196               | BIG BEND COMMUNITY COLLEGE                | 331             | BIG BEND COMMUNITY COLLEGE            |
|                   |   | 612             | BIG BEND COMMUNITY COLLEGE OJT        |
|                   |   | 636             | BBCC LEARNING CENTER CHILD CARE       |
| 240               | UNIVERSITY OF WASHINGTON                  | 697             | UNIVERSITY OF WASHINGTON TACOMA       |
|                   |   | 972             | UNIVERSITY OF WASHINGTON              |
| 270               | OKANOGAN COUNTY                           | 619             | OKANOGAN COUNTY COMMISSIONER'S OFFICE |
|                   |   | 637             | OKANOGAN COUNTY ASSESSOR              |
|                   |   | 1231            | OKANOGAN COUNTY CLERKS OFFICE         |
| 384               | LES SCHWAB TIRE CENTERS OF WASHINGTON INC | 334             | LES SCHWAB - MOSES LAKE               |
|                   |   | 335             | LES SCHWAB - EAST WENATCHEE           |
|                   |   | 336             | LES SCHWAB - WENATCHEE                |
|                   |   | 506             | LES SCHWAB - TWISP                    |
| 427               | EYE & EAR CLINIC                          | 274             | EYE & EAR CLINIC OF OKANOGAN          |
|                   |   | 505             | EYE & EAR CLINIC OF WENATCHEE         |
| 440               | GOODWILL INDUSTRIES OF THE COLUMBIA       | 316             | GOODWILL - WENATCHEE                  |
|                   |   | 474             | GOODWILL INDUSTRIES - MOSES LAKE      |
|                   |   | 810             | GOODWILL - EAST WENATCHEE             |
| 601               | SKAUG BROTHERS INC / CARPET ONE           | 358             | SKAUG BROTHERS INC / CARPET ONE       |
|                   |   | 414             | SKAUG BROTHERS INC / SPEEDY AUTO      |
|                   |   | 624             | SKAUG BROTHERS GLASS                  |

|      |   |      |   |
|------|---|------|---|
| 616  | FARMERS INSURANCE                           | 290  | DARREN STEELE INS AGENCY INC                |
|      |   | 477  | FARMERS INSURANCE: ALBERTA CANNON           |
|      |   | 836  | FARMERS INSURANCE GARZA INSURANCE AGENCY    |
|      |   | 1189 | FARMERS INSURANCE                           |
| 1551 | OIC OF WASHINGTON                           | 338  | OIC OF WENATCHEE                            |
|      |   | 339  | OIC OF MOSES LAKE                           |
| 1692 | SPECTRUM COMMUNICATIONS                     | 811  | SPECTRUM COMMUNICATIONS                     |
|      |   | 935  | SPECTRUM WENATCHEE                          |
| 1910 | FAMILY HEALTH CENTERS                       | 681  | FAMILY HEALTH CENTERS                       |
|      |   | 901  | FAMILY HEALTH CENTERS                       |
| 1963 | NORTH CASCADES BANK                         | 521  | NORTH CASCADES BANK                         |
|      |   | 936  | NORTH CASCADES BANK                         |
|      |   | 937  | NORTH CASCADES BANK                         |
| 1974 | SAFEWAY INC                                 | 2    | SAFEWAY - GRANT ROAD                        |
|      |   | 3    | SAFEWAY #1449                               |
|      |   | 4    | SAFEWAY - LEAVENWORTH                       |
|      |   | 5    | SAFEWAY - EPHRATA                           |
|      |   | 849  | SAFEWAY MOSES LAKE                          |
| 2245 | CATHOLIC FAMILY & CHILD SERVICE             | 552  | CATHOLIC CHARITIES OF THE DIOCESE OF YAKIMA |
|      |   | 1055 | CATHOLIC CHARITIES CENTRAL WA               |
| 2758 | NORTH CENTRAL CREDIT UNION                  | 128  | NUMERICA CREDIT UNION (WENATCHEE)           |
|      |   | 988  | NUMERICA CREDIT UNION (E. WENATCHEE)        |
| 2874 | SKILLSOURCE                                 | 172  | SKILLSOURCE - WENATCHEE                     |
|      |   | 322  | SKILLSOURCE - MOSES LAKE                    |
| 2976 | MONROE HOUSE RETIREMENT & CARE CENTER       | 601  | LAKE RIDGE CENTER                           |
|      |   | 696  | MONROE HOUSE RETIREMENT & CARE CENTER       |
| 3711 | AAA READY MIX INC II                        | 744  | AAA READYMIX LL INC (MOSES LAKE)            |
|      |   | 883  | AAA READY MIX II INC (WENATCHEE)            |
| 3747 | THE HOME DEPOT #4701                        | 12   | HOME DEPOT - WENATCHEE                      |
|      |   | 13   | HOME DEPOT - MOSES LAKE                     |
| 4439 | REHABILITATION AND EVALUATION SERVICES, INC | 457  | RES, INC (WEN)                              |
|      |   | 494  | RES, INC (ML)                               |
|      |   | 495  | RES, INC (YAKIMA)                           |
| 4902 | BOYS AND GIRLS CLUB                         | 669  | BOYS AND GIRLS CLUB OF NESPELEM             |
|      |   | 1037 | BOYS AND GIRLS CLUB OF THE COLUMBIA BASIN   |
| 5023 | WASHINGTON MUTUAL BANK                      | 6    | WAMU - EAST WENATCHEE FINANCIAL CENTER      |
|      |   | 7    | WAMU - WENATCHEE FINANCIAL CENTER           |
|      |   | 8    | WAMU - EPHRATA FINANCIAL CENTER             |
|      |   | 9    | WAMU - CHELAN FINANCIAL CENTER              |
|      |   | 10   | WAMU - MOSES LAKE FINANCIAL CENTER          |

|       |   |      |  |
|-------|---|------|--|
|       |   | 11   | WAMU - OMAK FINANCIAL CENTER                       |
| 5207  | CHELAN COUNTY                               | 439  | CHELAN COUNTY PUBLIC WORKS                         |
|       |   | 444  | CHELAN COUNTY CONSERVATION DISTRICT                |
|       |   | 785  | CHELAN COUNTY COMMUNITY DEVELOPMENT                |
|       |   | 786  | CHELAN COUNTY AUDITOR                              |
| 5834  | WAL MART ASSOCIATES INC                     | 397  | WAL-MART STORE #2187                               |
|       |   | 398  | WAL-MART SUPERCENTER STORE #2007                   |
|       |   | 399  | WAL-MART SUPERCENTER STORE #3260                   |
|       |   | 400  | WAL-MART SUPERCENTER STORE #3217                   |
|       |   | 401  | WAL-MART SUPERCENTER STORE #1947                   |
| 5847  | BURGER KING INTERNATIONAL                   | 378  | BURGER KING - 2842                                 |
|       |   | 379  | BURGER KING - 8241                                 |
|       |   | 380  | BURGER KING - 2848                                 |
|       |   | 381  | BURGER KING - 10966                                |
|       |   | 382  | BURGER KING - 6130                                 |
| 9753  | CONAGRA FOODS FOOD                          | 581  | CONAGRA FOODS LAMB WESTON                          |
|       |   | 1076 | CONAGRA Lamb Weston Quincy                         |
| 10089 | CHINOOK LUMBER INC                          | 376  | CHINOOK LUMBER INC                                 |
|       |   | 377  | CHINOOK LUMBER INC - EPHRATA                       |
| 10098 | COLUMBIA VALLEY COMMUNITY HEALTH - CVCH     | 404  | COLUMBIA VALLEY COMMUNITY HEALTH                   |
|       |   | 405  | COLUMBIA VALLEY COMMUNITY HEALTH - CHELAN          |
| 10101 | DIVISION OF VOCATIONAL REHABILITATION (DVR) | 417  | DIVISION OF VOCATIONAL REHABILITATION (DVR)        |
|       |   | 418  | DIVISION OF VOCATIONAL REHABILITATION (DVR) - OMAK |
|       |   | 419  | DIVISION OF VOCATIONAL REHABILITATION (DVR) - ML   |
| 10111 | SERVICE ALTERNATIVES                        | 456  | SERVICE ALTERNATIVES                               |
|       |   | 530  | SERVICE ALTERNATIVES, INC                          |
| 10116 | CENTRAL WASHINGTON UNIVERSITY               | 467  | CENTRAL WASHINGTON UNIVERSITY - WENATCHEE          |
|       |   | 1056 | CENTRAL WASHINGTON UNIVERSITY - MOSES LAKE         |
|       |   | 1181 | CENTRAL WASHINGTON UNIVERSITY - ELLENSBURG         |
| 10203 | COLVILLE GAMING LLC                         | 632  | 12 TRIBES RESORT CASINO                            |
|       |   | 775  | COLVILLE TRIBES                                    |
| 10211 | SENIOR CENTER THRIFT STORE                  | 642  | SENIOR CENTER THRIFT STORE                         |
|       |   | 779  | EPHRATA SENIOR CENTER THRIFT STORE                 |
| 10217 | WORKSOURCE CHELAN/GRANT COUNTY              | 653  | WORKSOURCE CHELAN/GRANT COUNTY                     |
|       |   | 1198 | EMPLOYMENT SECURITY DEPARTMENT                     |
| 10220 | GROCERY OUTLET                              | 656  | GROCERY OUTLET EAST WENATCHEE                      |
|       |   | 858  | GROCERY OUTLET EPHRATA                             |
|       |   | 1233 | GROCERY OUTLET - OMAK                              |
| 10235 | NEW HOPE                                    | 678  | NEW HOPE   |
|       |   | 690  | GRANT COUNTY DIRECTIONS IN COMMUNITY LIVING        |

|       |   |      |  |
|-------|---|------|--|
| 10246 | AKINS FOOD INC                            | 692  | AKINS FOODS INC                            |
|       |   | 772  | AKIN'S FOODS                               |
| 10312 | WSU CHELAN-DOUGLAS CO EXTENSION           | 797  | WSU CHELAN CO EXTENSION                    |
|       |   | 1193 | WSU DOUGLAS CO EXTENSION                   |
| 10450 | CUSTOM APPLE PACKERS, INC (STARR)         | 859  | STARR RANCH QUINCY                         |
|       |   | 993  | ONEONTA STARR RANCH GROWERS                |
| 25514 | BOULDER BEND GLASSWORKS                   | 1012 | BOULDER BEND GLASSWORKS - WENATCHEE        |
|       |   | 1014 | BOULDER BEND GLASSWORKS - PESHASTIN        |
| 25574 | COUNTRY FINANCIAL                         | 1096 | COUNTRY FINANCIAL                          |
|       |   | 1128 | COUNTRY FINANCIAL                          |
|       |   | 1145 | COUNTRY FINANCIAL - OMAK                   |
| 25587 | NORTH CENTRAL REGIONAL LIBRARY            | 1098 | NORTH CENTRAL REGIONAL LIBRARY - SOAP LAKE |
|       |   | 1122 | NORTH CENTRAL REGIONAL LIBRARY             |
| 25613 | NORTH CASCADES LAW GROUP, PLLC            | 1126 | NORTH CASCADES LAW GROUP, PLLC - Tonasket  |
|       |   | 1127 | NORTH CASCADES LAW GROUP, PLLC - Okanogan  |
| 25628 | HALO LOXX                                 | 1142 | HALO LOXX                                  |
|       |   | 1143 | RENEW SALON AND SPA                        |
| 25651 | OXARC                                     | 1166 | OXARC - WENATCHEE                          |
|       |   | 1167 | OXARC - WEN                                |
|       |   | 1168 | OXARC - MOSES LAKE                         |
|       |   | 1169 | OXARC - OKANOGAN                           |
| 25701 | LIVE NATION                               | 1222 | GORGE AMPHITHEATER                         |
|       |   | 1223 | LEGENDS HOSPITALITY, LLC                   |
| 25704 | CHELAN DOUGLAS CHILD SERVICES ASSOCIATION | 1226 | WENATCHEE CENTER                           |
|       |   | 1227 | METHOW CENTER                              |
|       |   | 1228 | WESTSIDE CENTER                            |
|       |   | 1229 | SUNSET RIDGE                               |
|       |   |      |  |

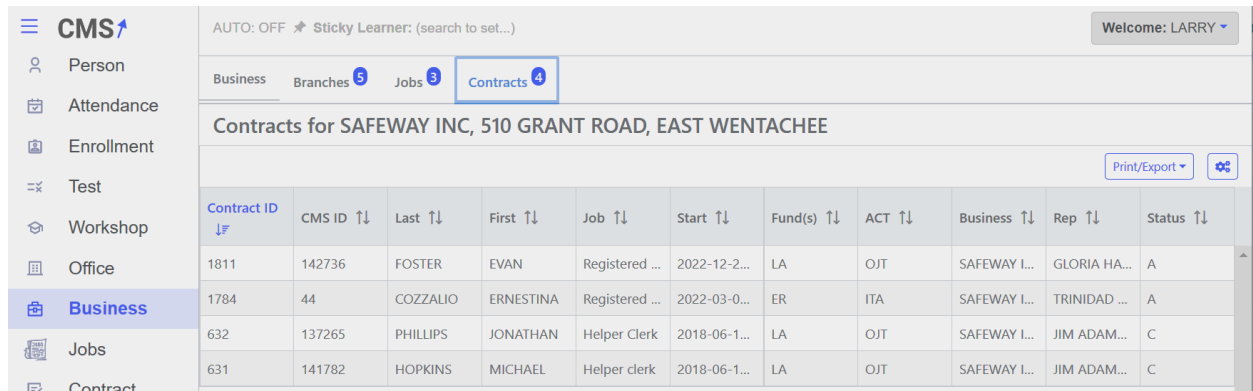


When clicking on the Jobs tab the following list of jobs is displayed.



| Branch Name | Rep  | Job Fam | Job Title       | Start Date | PT | Wage/Hr | OJT Yes | WexYes | Status |
|-------------|------|---------|-----------------|------------|----|---------|---------|--------|--------|
| SAFEWAY INC | J.B. | 11      | Stocking Sup... | 12-29-2022 | N  | 11.50   | Y       | N      | A      |
| SAFEWAY INC | J.B. | 35      | TESTING         | 12-29-2022 | N  | 9.99    | Y       | N      | A      |
| SAFEWAY INC | R.O. | 11      | HELPER CLERK    | 12-29-2022 | Y  | 11.00   | Y       | N      | A      |

When clicking on the Contracts tab the following list of Contracts is displayed;



| Contract ID | CMS ID | Last     | First     | Job            | Start        | Fund(s) | ACT | Business     | Rep          | Status |
|-------------|--------|----------|-----------|----------------|--------------|---------|-----|--------------|--------------|--------|
| 1811        | 142736 | FOSTER   | EVAN      | Registered ... | 2022-12-2... | LA      | OJT | SAFEWAY I... | GLORIA HA... | A      |
| 1784        | 44     | COZZALIO | ERNESTINA | Registered ... | 2022-03-0... | ER      | ITA | SAFEWAY I... | TRINIDAD ... | A      |
| 632         | 137265 | PHILLIPS | JONATHAN  | Helper Clerk   | 2018-06-1... | LA      | OJT | SAFEWAY I... | JIM ADAM...  | C      |
| 631         | 141782 | HOPKINS  | MICHAEL   | Helper clerk   | 2018-06-1... | LA      | OJT | SAFEWAY I... | JIM ADAM...  | C      |

Double click on any row to bring up an entry/edit dialog for the selected contract.

I hope it is abundantly clear how important it is to prevent duplicate records in the Business database. A single **Business** can have many branches and a **Branch** can have multiple **Job** openings and/or multiple **Contracts** and multiple **Casenotes**. If there are duplicate records in the database for a single Business the possible proliferation of bad data is exponential! The next section will explain the benefits of a clean and accurate business database.

See the section on [What is the Value of Recording all Business Interactions](#).

# Why an Accurate De-Duplicated Business Database is Important

As a Workforce Innovation and Opportunity Act (WIOA) agency, having and maintaining an accurate business database offers numerous benefits that can enhance the efficiency and effectiveness of your operations. Here are some key values:

## 1. Improved Employer Engagement:

- **Relationship Building:** An accurate database helps in building and maintaining strong relationships with local employers, making it easier to understand their needs and offer tailored workforce solutions.
- **Communication:** Facilitates timely and effective communication with employers regarding job openings, workforce training programs, and other relevant opportunities.

## 2. Enhanced Job Matching:

- **Accurate Job Listings:** Ensures that job seekers have access to up-to-date and accurate job listings, improving their chances of finding suitable employment.
- **Skill Alignment:** Helps in aligning job seekers' skills with employers' needs, leading to better job placements and satisfaction for both parties.

## 3. Efficient Resource Allocation:

- **Targeted Services:** Enables the agency to target resources and services more effectively to areas of greatest need, such as specific industries or regions with higher demand for workers.
- **Training Programs:** Assists in the development of training programs that are directly aligned with the needs of local businesses, ensuring that the workforce is equipped with relevant skills.

## 4. Data-Driven Decision Making:

- **Labor Market Insights:** Provides valuable insights into labor market trends, helping the agency make informed decisions about program offerings and policy initiatives.
- **Performance Metrics:** Allows for the tracking and analysis of key performance metrics, such as employment rates and job retention, to measure the effectiveness of workforce programs.

## 5. Compliance and Reporting:

- **WIOA Requirements:** Ensures compliance with WIOA requirements for tracking and reporting employment outcomes, business engagement activities, and other key metrics.
- **Funding Justification:** Provides data to justify the allocation of federal and state funding for workforce programs, demonstrating the agency's impact on the local economy.

## 6. Support for Economic Development:

- **Business Growth:** Assists in supporting the growth and development of local businesses by connecting them with qualified talent and resources.
- **Economic Stability:** Contributes to the overall economic stability and growth of the community by facilitating successful employment outcomes and reducing unemployment rates.

# What is the Value of Recording all Business Interactions

Recording all interactions with businesses as part of Workforce Innovation and Opportunity Act (WIOA) programming is essential for several reasons. Here's a structured case:

## 1. Enhanced Accountability and Transparency

- **Traceable Interactions:** Recording all interactions ensures that there is a transparent, traceable record of engagement, which is critical for maintaining public trust and meeting compliance standards.
- **Data Integrity:** Having a clear and documented account of interactions helps maintain data integrity. Accurate records make it easier to account for the use of resources, especially when responding to audits or reporting requirements.

## 2. Improved Relationship Management

- **Business History:** Comprehensive records provide WIOA staff and future employees a full view of prior interactions, insights into preferences, and knowledge of past agreements or concerns.
- **Personalization:** With historical data, staff can better personalize follow-up interactions, tailoring services to meet the specific needs of each business, improving service quality and fostering trust.

## 3. Informed Decision-Making and Strategy Development

- **Data-Driven Strategies:** By analyzing recorded interactions, WIOA staff can identify trends and assess which services or approaches are most effective. This data can shape more effective workforce development strategies.
- **Tracking Engagement Effectiveness:** Continuous tracking allows staff to assess the responsiveness and outcomes of their outreach efforts, helping them refine engagement tactics and optimize allocation of resources.

## 4. Enhanced Coordination and Collaboration

- **Improved Internal Communication:** Recording interactions allows various WIOA team members and departments to access the same information, reducing misunderstandings or redundancies.
- **Streamlined Support Across Programs:** Many businesses engage with multiple workforce programs. By recording interactions, WIOA staff can collaborate more effectively with other programs, providing a cohesive experience to businesses.

## 5. Documentation of Outcomes and Impact

- **Outcome Tracking:** Tracking interactions can provide direct evidence of outcomes, such as new hires, training completions, or other business support results.

- **Impact Measurement:** Recorded interactions allow WIOA staff to capture metrics that reflect the program's impact on workforce development within a region, supporting data-driven advocacy and policy-making.

## 6. Efficient Use of Resources and Time Management

- **Avoiding Duplication of Efforts:** Documented interactions prevent the repetition of questions and services, as staff can quickly refer to past records, making interactions more efficient.
- **Efficient Follow-Ups:** When follow-up actions are clearly recorded, WIOA staff can quickly prioritize tasks and provide more targeted assistance, reducing the time needed to gather context in subsequent meetings.

## 7. Compliance with Legal and Grant Requirements

- **Grant Reporting:** Many federal and state workforce programs require thorough documentation to substantiate the use of funds, outcomes achieved, and adherence to program goals.
- **Legal Protection:** Recorded interactions can protect the WIOA program and staff by providing evidence of due diligence, fair service delivery, and adherence to agreements, which is essential in case of any disputes or misunderstandings.

In summary, recording all business interactions under WIOA can significantly enhance service quality, accountability, and strategic alignment while maximizing the program's positive impact on local economies.

# Jobs

## Current Job Openings Grid

| Branch Name          | Job Title                   | Start Date | PT | Wage/Hr | OJT Yes | WexYes | Status |
|----------------------|-----------------------------|------------|----|---------|---------|--------|--------|
| WEINSTEIN BEVERAGE   | Merchandizer                | 04-28-2023 | N  | 16.00   | N       | N      | A      |
| MARTIN'S MARKETPLACE | stocker cashier entry level | 04-24-2023 | Y  | 15.74   | Y       | Y      | A      |
| INNOVATIVE PRECAST   | General Laborer             | 03-17-2023 | N  | 17.00   | Y       | Y      | A      |

You can also get to this functionality from the Business/Business Branch area as you probably noticed in the previous screen shots.

The purpose of this is to provide an easy way to manage current unfilled position openings among our business customers. Only job records with an Active(A) status will show up on this screen. You can right click on a job(row) and select “Remove from list” to take jobs off the list when they are filled. This action simply changes the Status from “A” to “I” for Inactive.

The following is one way this functionality can be used:

1. All information about possible job opportunities can be entered into CMS **regardless** of the job’s potential to become a WEX or OJT. It is highly desirable to capture as much as we know about a business as soon as we know it and begin adding business casenotes so that everyone in the office can get good current information about the business and our touch points. You can access the casenotes using a right-click option on the branch record (row).
2. When you click the blue **Add Job** button you will be shown an entry/edit form to record information about the job. The top of this form looks like this:

New Job details

Business Job Number: 0

Business Branch # \*

Type Business Branch #

Contact Name:

Contact Phone:

Contact Email:

Link to Vendor Validation + Add Job Print/Export

The Business Branch# field shown above is a **multi-functional** field. You **do not** have to know the branch number to use it. Just start typing any part of the business name you are looking for and you will discover quickly if the business branch exists. *If the business branch does not exist, then close the form by clicking the ‘x’ in the upper right corner and then click “Link to Vendor Validation” and enter what you know about the business in this shared google sheet.* And yes, this is easy enough for you to do right on the phone with the potential employer. It usually takes less than 24 hours and often less than one hour to get the business branch record created. Whoever creates the business branch will update the google sheet entry with the business branch number. Once you have

that number you can come back to the Jobs tab, click **Add Job** and enter the number in the Business Branch # field and complete the rest of the form.

3. When creating a new job opening, you will be asked to classify it by picking from a **Job Family** list:

New Job details

Business Job Number: 0

Business Branch # \*: 1123: BREADLINE CAFE

Contact Name:

Contact Phone: 5098265836

Contact Email:

Start Date: 08-11-2023

End Date: 08-11-2023

Office \*: WORKSOURCE - OKANOGAN

Staff \*: CHLOE RAMIREZ

Job Family \*: - Select Job Family -

- Healthcare Practitioners and Technical Occupations
- Healthcare Support Occupations
- Protective Service Occupations
- Food Preparation and Serving Related Occupations**
- Building, Grounds, and Maintenance Occupations

The Start Date is required. The End Date is an optional field. Or you can just enter the current date in both fields if neither is known.

The form includes two fields for general information: **Job Description** and **Notes**:

Job Title \*: CNC MACHINIST

Job Description \*: A CNC machinist is a skilled professional who operates and maintains CNC (Computer Numerical Control) machines used in manufacturing and production.

Notes: They are looking to fill 5 CNC Machinist positions-no experience needed, and they are willing to train. They are a Veteran friendly employer and state that they will hire a Veteran on the spot. Contact Matt or Rich at (509) 888-3300.

These fields are limited to 250 characters.

## List of Job Families

**Job Families:** (the number is the first two digits of the ONET code and the percentage shows historically the most frequently chosen families. Most of our jobs over the past 10 years have been assigned families 29, 43 or 53)

- 11 **Management Occupations (2.6%)**
- 13 **Business and Financial Operations Occupations (1.7%)**
- 15 **Computer and Mathematical Occupations (3.6%)**
- 17 Architecture and Engineering Occupations (0.5%)
- 19 **Life, Physical, and Social Science Occupations (1.1%)**
- 21 **Community and Social Services Occupations (2.3%)**
- 23 Legal Occupations (0.2%)
- 25 Education, Training, and Library Occupations (0.9%)
- 27 Arts, Design, Entertainment, Sports, and Media (0.6%)
- **29 Healthcare Practitioners and Technical Occupations (13.04%)**
- 31 **Healthcare Support Occupations (6.5%)**
- 33 Protective Service Occupations (0.07%)
- 35 **Food Preparation and Serving Related Occupations (2.2%)**
- 37 Building, Grounds, and Maintenance Occupations (0.8%)
- 39 **Personal Care and Service Occupations (1.8%)**
- 41 **Sales and Related Occupations (2.38%)**
- **43 Office and Administrative Support Occupations (12.90%)**
- 45 Farming, Fishing, and Forestry Occupations (0.1%)
- 47 **Construction and Extraction Occupations (3.1%)**
- 49 **Installation, Maintenance, and Repair Occupations (3.9%)**
- 51 **Production Occupations (5.9%)**
- **53 Transportation and Material-Moving Occupations (35.30%)**
- 55 Military Specific Occupations (0%)

This classification will help staff find jobs by a specific job family.

The screenshot shows a web application for job searching. At the top, there's a 'Jobs' section with a dropdown menu set to 'Active' and another dropdown menu set to 'All Job Families' (highlighted with a red box). To the right of these is a 'Search' button. Further right are links for 'Link to Vendor Validation' and a '+ Add Job' button. Below the filters is a table with the following headers: 'Branch Name', 'Rep', 'Job Fam', 'Job Title', 'Start Date', 'PT', 'Wage/Hr', 'OJT Yes', 'WexYes', and 'Stat'. Below the table header, it says 'No records found'.

# Workshop

## Finding Workshops

The screenshot shows the CMS interface with the 'Workshop' tab selected. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop (selected), and Office. The main content area has a 'Workshop' header with a 'Show Filters' button. Below the header, there are input fields for 'Start Date' (08-18-2022) and 'End Date' (08-18-2022), with 'Load Workshops' and 'Clear' buttons. A table with columns: Workshop #, Course Title, Office-Room(s), Delivery Method, Start Date, Total Enrolled, and Status is shown. The table contains the text 'No records found'.

When you click the **Show Filters** button on the screen above the following side dialog will appear.

The screenshot shows the CMS interface with the 'Workshop' tab selected. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop (selected), Office, Business, Contract, Reports, and Admin. The main content area has a 'Workshop' header with a 'Hide Filters' button. Below the header, there are input fields for 'Start Date' (08-18-2022) and 'End Date' (08-18-2022), with 'Load Workshops' and 'Clear' buttons. A table with columns: Workshop #, Course Title, Office-Room(s), Delivery Method, Start Date, Total Enrolled, and Status is shown. The table contains the text 'No records found'. A side dialog is open, showing filters for Rooms (All rooms), Courses (All courses), and Active Only (checked). There are buttons for 'Load Workshops' and 'Clear'. Below the filters, there are input fields for 'Workshop #' and 'CMS ID', with buttons for 'Find by Workshop #' and 'Find by CMS ID'.

In the following dialog I have looked up a workshop #11013 and have it showing all the attendance as well.

The screenshot shows the CMS interface with the 'Workshop' tab selected. The left sidebar contains navigation links: Person, Attendance, Enrollment, Test, Workshop (selected), Office, Business, Contract, Reports, and Admin. The main content area has a 'Workshop' header with a 'Hide Filters' button. Below the header, there are input fields for 'Start Date' (mm-dd-yyyy) and 'End Date' (mm-dd-yyyy), with 'Load Workshops' and 'Clear' buttons. A table with columns: Workshop #, Course Title, Office-Room(s), Delivery Method, Start Date, Total Enrolled, and Status is shown. The table contains the following data:

| Workshop # | Course Title       | Office-Room(s) | Delivery Method | Start Date | Total Enrolled | Status |
|------------|--------------------|----------------|-----------------|------------|----------------|--------|
| 11013      | The Growth mindset | SS-VR-CD       | F2F             | 09-07-2021 | 5              | A      |

Below the table, there is a section for 'Attendance' with a date range of 2021-09-07 to 2021-10-19. A table with columns: Reg #, CMS ID, First Name, Last Name, Reg Status, Office, and a grid of checkboxes for dates from 2021-09-07 to 2021-10-19 is shown. The table contains the following data:

| Reg # | CMS ID | First Name | Last Name | Reg Status | Office | 2021-09-07                          | 2021-09-14                          | 2021-09-21                          | 2021-09-28               | 2021-10-05               | 2021-10-12               | 2021-10-19               |
|-------|--------|------------|-----------|------------|--------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| 72908 | 90674  | HANNA      | AARON     | A          | SS     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 72859 | 150045 | ZEYNEB     | KAZIMOV   | A          | SS     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 72847 | 96333  | HEATHER    | MONDINI   | A          | SS     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 72846 | 138724 | LORI       | THIEL     | A          | SS     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 72841 | 114350 | MYRON      | HOPE      | A          | SS     | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

At the bottom, there is a pagination bar showing 'Items 1 to 5 of 5' and a 'Go to page: 1 / 1' button.



## Edit Workshop

Edit workshop

×

Event Information

Event Days

Workshop Information

Workshop #: 11013

Event Type: WORKSHOP

Course

WCD08-The Growth mindset

▼

Short Title

WCD08

Status

☒ Active ☐ Tentative ☐ Cancelled

Delivery Method?

☒ In person ☐ Virtual ☐ Both

Office

SKILLSOURCE - WENATCHEE

▼

Contact

LARRY HENDERSON

▼

☒ Public Event? [Check Event Calendar](#)

Qualifying Workshop? No

Save

Cancel

## Event Days

Edit workshop

×

Event Information

Event Days

Workshop Information

<

September 2021

>

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 29 | 30 | 31 | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 1  | 2  |

Selected Dates:

2021-09-07

2021-09-14

2021-09-21

2021-09-28

2021-10-05

2021-10-12

2021-10-19

Start Time

10:00 AM

📅

End Time

11:30 AM

📅

Description

Note

Office

SKILLSOURCE - WE...

▼

Room

Select Room

▼

Instructor

THERESA STRONG

▼

Set all

Save

Cancel

# Creating a New Workshop

Notice there are 3 tabs to the new Workshop Entry/Edit dialog. The first tab is **Event Information**. The **Course** drop-down list is automatically constrained to only those courses offered by the **Office** shown a little further down. The office shown by default is the office of the logged-in **staff** user. If you select a different office, then the list of courses will change to only those courses offered by that office.

**In person** is the usual way of delivery. **Virtual** means that the workshop is delivered via Zoom or some other zoom-like online technology. And sometimes a workshop is **both** in person and virtual. If the workshop is either Virtual or Both, then the workshop should be available for participants in all offices.

When you check the “**Public Event?**” box, the workshop will be copied to the appropriate Google calendar automatically. Do not click the **Save** until you have completed the **Event Days** tab.

New workshop
×

Event Information
Event Days
Workshop Information

<
November 2023
>

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 29 | 30 | 31 | 1  | 2  | 3  | 4  |
| 5  | 6  | 7  | 8  | 9  | 10 | 11 |
| 12 | 13 | 14 | 15 | 16 | 17 | 18 |
| 19 | 20 | 21 | 22 | 23 | 24 | 25 |
| 26 | 27 | 28 | 29 | 30 | 1  | 2  |

Start Time
End Time

12:00 AM
05:05 PM

Description

Note

Office
Room

SKILLSOURCE - WE...
Select Room

Instructor

Select Instructor

Set all

Selected Dates:

Save
Cancel

Be sure to select all the days of the workshop and set the Start Time, End Time, Room and Instructor. If the workshop involves more than one day and the Start Time, End Time, Room and Instructor are the same for each day, just click the **Set All** button. Otherwise, you can customize each day's Start Time, End Time, Room and Instructor.

Most times you can click the Save button without going to the final Workshop Information tab, but in case you do, here is what that screen looks like:

New workshop
×

Event Information
Event Days
Workshop Information

Signup MIN
Signup MAX

0
0

Note

Save
Cancel

## Workshop Duplication Feature

1. *The context menu (right click) has an option called "Duplicate" - an automated way to make an exact copy of the workshop using one or more future start dates. The **user will NOT be allowed to pick a different start day** (of the week) than the start day of the original workshop.*
  - A. If the workshop is a single day event on a Wednesday, for example, you will only be able to pick Wednesdays in the future to duplicate to. All the other days of the calendar will not be selectable.
  - B. If the workshop is a multi-day event on a **Tuesday**, Wednesday and Thursday, for example, then the user will only be able to select **Tuesdays** in the future to duplicate to. You do not need to select each day for the duplicated event. In fact, the other days of the calendar will not even be selectable.
2. *All the data (event and workshop information including "Start Time" and "End Time" fields on the corresponding tabs) is disabled for change during the duplication process.*

**Duplicate workshop** [X]

**Duplicating Action For Career Employment**

Please choose start date via the calendar below:

| October 2023 |    |    |    |    |    |    |
|--------------|----|----|----|----|----|----|
| Su           | Mo | Tu | We | Th | Fr | Sa |
| 1            | 2  | 3  | 4  | 5  | 6  | 7  |
| 8            | 9  | 10 | 11 | 12 | 13 | 14 |
| 15           | 16 | 17 | 18 | 19 | 20 | 21 |
| 22           | 23 | 24 | 25 | 26 | 27 | 28 |
| 29           | 30 | 31 | 1  | 2  | 3  | 4  |

Selected Dates:

2023-10-12 [X] 2023-10-19 [X]

**Duplicate** Clear dates Cancel

3. *Other days (except start date) are NOT available for selection (the blue selected highlight will not appear) - they might be changed only after such a duplicated workshop record is already completed, namely while editing the process of such record itself.*

4. Once all the new start dates are selected, the user will be shown a report (displayed as a pop-up notification) of what is about to happen (before it actually happens). This report indicates how many workshops will be created.

The report format is as following:

The screenshot shows a 'Duplicate workshop' dialog box with a close button (X) in the top right corner. The title is 'Duplicate workshop'. Below the title, it says 'Duplicating Action For Career Employment'. A prompt reads: 'Please choose start date via the calendar below:'. Below this prompt is a 'Workshop Duplication Report' pop-up window. The report has a table with the following data:

| Start Date | Day of Week | Room  | WksCode |
|------------|-------------|-------|---------|
| 02-09-2024 | Friday      | CU100 | ACE1    |
| 02-16-2024 | Friday      | CU100 | ACE1    |

Below the table, it says 'Duplication Status: Completed successfully'. Then it asks 'Do you want to create these duplicates?'. At the bottom, there are two buttons: 'Yes' (red) and 'No' (white with blue border). In the background, there is a calendar interface with dates '2024-02-09' and '2024-02-16' selected, and buttons 'Duplicate', 'Clear dates', and 'Cancel'.

The left screenshot shows a 'Workshop Duplication Report' with a table of four rows:

| Start Date | Day of Week | Room  | WksCode |
|------------|-------------|-------|---------|
| 02-09-2024 | Friday      | CU100 | ACE1    |
| 02-16-2024 | Friday      | CU100 | ACE1    |
| 01-19-2024 | Friday      | CU100 | ACE1    |
| 01-26-2024 | Friday      | CU100 | ACE1    |

The 'Duplication Status' section lists two conflicts:

1. Terminated due to conflict on 01-19-2024 (Wks # ACE1)
2. Terminated due to conflict on 01-26-2024 (Wks # ACE1)

The 'Yes' button is highlighted in red.

The right screenshot shows a 'Workshop Duplication Report' with a table of three rows:

| Start Date | Day of Week | Room  | WksCode |
|------------|-------------|-------|---------|
| 09-29-2023 | Friday      | CU100 | ACE1    |
| 10-06-2023 | Friday      | CU100 | ACE1    |
| 10-13-2023 | Friday      | CU100 | ACE1    |

The 'Duplication Status' section lists three conflicts:

1. Terminated due to conflict on 09-29-2023 (Wks # ACE1)
2. Terminated due to conflict on 10-06-2023 (Wks # ACE1)
3. Terminated due to conflict on 10-13-2023 (Wks # ACE1)

The 'Cancel' button is highlighted in blue.

The condition that would disallow the creation of a given duplication instance is if any of the dates/times/rooms for that instance aren't available because another event in the same room has been scheduled for the same. The user should be asked if they would like to create duplications up to the date of first conflict or terminate the whole process. The report will show a conflict date so the user can terminate the duplication process and go back and unselect that date if desired. One common conflict example is when a 3-day ACE workshop from 1 - 4pm Tues, Wed and Thursday conflicts with an Orientation at 1:30 in the same room on Thursday (last day of the workshop). Make sure you schedule such events in a different room.

5. *If a workshop has several different rooms for different days the room for the first workshop day is displayed in the report.*
6. *Each new workshop created by this process will also be reflected in the Google calendar just as it happens when a single workshop is created.*
7. *Updates to the original event (or any event created by duplication) do not cascade to all the other related events. Duplicating an event will create several individual events, and after duplication, a user has to manage each created event individually.*
8. *Deleting the original event has no impact on duplicated events. But deleting individual events involves the same processes that exist now, i.e. corresponding Google calendar events are also deleted.*
9. *The system does NOT allow duplication more than 12 months into the future from the current date when the user is duplicating a workshop record.*
10. *If a future workshop event crosses over a Daylight Savings Time boundary the start and end time should still display correctly, but make sure you check it.*
11. *The system does NOT allow duplicating workshop records older than a month, so a "Duplicate" context menu option is NOT displayed for past workshop records older than a month.*

## Issue Resolution: Deleting all Attendees

If you cannot open the Attendees Tab there is a right-click menu option on a workshop row as shown below:

The screenshot shows the CMS interface with a sidebar on the left containing navigation links: Person, Attendance, Enrollment, Test, Workshop (selected), Office, Business, Jobs, Contract, Reports, and Admin. The main content area displays a table of workshops. The 'Attendees' tab is active, showing 0 attendees. A right-click context menu is open over the row for Workshop # 11753, titled 'Action For Career Emplo...'. The menu options are: Enroll sticky learner, Enroll by CMS ID, Edit Event Details, Delete all attendees (highlighted), Cancel Event, Set Event to Tentative, Set Event to Active, Duplicate, and Delete event. A red arrow points from the 'Delete all attendees' option to the 'Attendees' tab in the top navigation bar.

Use this ONLY if you are unable to open the Attendees Tab. After you have deleted all the attendees you will need to re-enroll them one at a time.

When you click on a row, the Attendees tab should become enabled showing the number enrolled. The reason the image above is showing 0 instead of 24 on the Attendees tab is because I failed to actually left-click on the row. I did a right-click to get the context menu to appear. So nothing is actually wrong with this workshop and it would be a serious mistake to Delete all attendees. **Use this feature ONLY if you are unable to open the Attendees tab.**

# Contracts

## Finding Contracts

The screenshot shows the CMS interface with the 'Contract' menu item selected in the sidebar. The main content area displays a table with columns: Contract ID, CMS ID, Last, First, Job, Start, Fund(s), ACT, Business, Rep, and Status. Below the table, it states 'No records found'. Above the table, there is a search bar labeled 'Seeker' and a 'Run Report' button. To the right of the search bar are buttons for 'Get By Contract ID', '+ Add contract', and 'Print/Export'.

By clicking the **Show Filters** button the following sidebar appears:

The screenshot shows the CMS interface with the 'Contract' menu item selected. The sidebar on the left contains filters for Office, Fund, Activity Code, and Status. The 'Office' filter is set to 'SKILLSOURCE - WENATCHEE', 'Fund' is set to 'All Funds', 'Activity Code' is set to 'All Activity Codes', and 'Status' is set to 'All Statuses'. The 'Run Report' button is visible at the bottom of the sidebar. The main content area shows the same table structure as before, but it is currently empty.

I want to search for all LA OJT's that have an Active status:

The screenshot shows the CMS interface with the 'Contract' menu item selected. The sidebar on the left contains filters for Office, Fund, Activity Code, and Status. The 'Office' filter is set to 'SKILLSOURCE - WENATCHEE', 'Fund' is set to 'LA', 'Activity Code' is set to 'OJT', and 'Status' is set to 'Active'. The 'Run Report' button is visible at the bottom of the sidebar. The main content area displays a table with 11 rows of contract data.

| Contract ID | CMS ID | Last       | First   | Job           | Start      | Fund(s) | ACT | Business       | Rep         | Status |
|-------------|--------|------------|---------|---------------|------------|---------|-----|----------------|-------------|--------|
| 1742        | 150125 | TOLLACK... | ALLISON | caregiver     | 2021-08-14 | LA      | OJT | Amber W...     | JIM ADA...  | A      |
| 1741        | 34980  | VINCENT    | RONALD  | tech supp...  | 2021-08-15 | LA      | OJT | GTC TECH...    | JIM ADA...  | A      |
| 1725        | 150044 | DURNELL    | RYAN    | Gutter ins... | 2021-07-27 | LA      | OJT | All NCW S...   | JIM ADA...  | A      |
| 1706        | 150105 | POPOVICH   | DAVID   | Cabinet ...   | 2021-07-05 | LA      | OJT | Traditiona...  | JIM ADA...  | A      |
| 1628        | 149951 | JACKSON    | DIANE   | Medical O...  | 2021-05-09 | LA      | OJT | Riverwalk ...  | DONITA B... | A      |
| 1597        | 142551 | JACKSON    | AMY     | Administr...  | 2021-03-23 | LA      | OJT | Sister Con...  | DONITA B... | A      |
| 1585        | 134388 | PIPPIN     | MATTHEW | Exhibit & ... | 2021-03-31 | LA      | OJT | Wenatche...    | JIM ADA...  | A      |
| 1583        | 149769 | JOURNEE    | CORDE   | Constructi... | 2021-03-23 | LA      | OJT | PIPKIN C...    | JIM ADA...  | A      |
| 1465        | 123336 | CABRERA    | PAOLA   | infant lea... | 2020-11-08 | LA      | OJT | Training E...  | JIM ADA...  | A      |
| 1397        | 149358 | FULLER     | WHITNEY | Marketing...  | 2020-09-09 | LA      | OJT | Viscontis I... | DONITA B... | A      |
| 1314        | 149233 | COPPOCK    | TRACE   | Technical ... | 2020-05-20 | LA      | OJT | GTC TECH...    | DONITA B... | A      |



# New Contract Wizard

The screenshot shows the CMS/ SkillsSource interface. On the left is a navigation menu with options: Person, Attendance, Enrollment, Test, Workshop, Office, Business, **Contract**, Reports, and Admin. The main content area is titled 'Contract' and includes a 'Hide Filters' button. Below this is a search bar for 'Seeker' with a 'Run Report' button. To the right of the search bar are buttons for 'Get By Contract ID', '+Add contract' (highlighted with a red arrow), and 'Print/Export'. Below these buttons is a table with columns: Contract ID, CMS ID, Last, First, Job, Start, Fund(s), ACT, Business, Rep, and Status. The table currently shows 'No records found'.

This screen provides search filters for producing a list of contracts, The red arrow points to the button you click when starting a new contract. When clicked the following screen will appear:

The 'Create New Contract' form is displayed. It includes a close button (X) in the top right corner. The form fields are organized as follows:
 

- Enter CMS #:** A text input field with a yellow highlight.
- Load Participant Record:** A blue button.
- SKILLSOURCE - WENATCHEE:** A dropdown menu.
- Full Name:** A text input field.
- DOB:** A text input field.
- Address:** A text input field.
- Gender:** A text input field.
- Phone:** A text input field.
- Status:** A text input field.
- Start Date:** A date picker with a yellow highlight and a calendar icon.
- Fund Code:** A dropdown menu with a yellow highlight, currently showing '- Select Fund -'.
- Contract Type:** A dropdown menu with a yellow highlight, currently showing '- Select Activity Code -'.
- Business Branch #:** A text input field with a yellow highlight, currently showing 'Type Business Branch #'.
- Business:** A text input field.
- Phone:** A text input field.
- Address:** A text input field.
- Email:** A text input field.

 At the bottom of the form are two buttons: 'Next' (blue) and 'Cancel' (white with a blue border).

Most contracts require a real participant cmsID# to begin. The one exception is the IWT contract. We are using cmsID# 1 for all IWT contracts. The Full Name will read **IWT Participant**.

This is the same screen which starts the new contract wizard, but with actual selections made.

Create New Contract

×

Enter CMS #

12345

Load Participant Record

SKILLSOURCE - WENATCHEE

Full Name:

TODD PORTZLINE

DOB:

11-22-1977

Address:

53809 TODDST STREET CASHMERE 98815

Gender:

M

Phone:

5438458550

Status:

A

Start Date:

09-05-2022

Fund Code

LA

Contract Type

OJT

Business Branch #

3: SAFEWAY INC

Business:

SAFEWAY INC

Phone:

5096635336

Address:

501 NORTH MILLER ST WENATCHEE WA 98801

Email:

someone@safewayinc.com

Next

Cancel

Click Next to continue to the second step of contract creation. The next steps are driven by the selected Contract Type above.

This screen is mostly for verifying that the selected entities are correct. There is also a field for typing in the business signer's name. **This verification step is very important, because for some of these elements (e.g. Activity Code) you cannot change them after the contract has been created. Be sure to enter the End Date (estimated end date).**

**New OJT contract**

Person and Business | ONET, Hours and Skills | Fund Distribution | Enhancements

**Contract Details**

Contract ID: -- Status: Active Office: SKILLSOURCE - WENATCHEE

Activity Code: OJT Fund Code: LA Trainer: MELISSA ODELL (SS-A)

**End Date**: 08-29-2025 **Office Signer**: HEIDI LAMERS (SS-A)

**Person information**

CMS ID: 12345 Full Name: TODD PORTZLINE Phone: 2532034156

Gender: M DOB: 1970-11-22

**Business information**

Branch ID: 2 Status: A

Branch Name: SAFEWAY - GRANT ROAD Address: EAST WENTACHEE WA 98802-8563 Phone: 5098840707

Email: -- **Signer Name**:

☐ Is Contract Modification? Total Enhancements \$ 0.00 Total Contract Obligation \$ 0.00 Total Paid to Date \$ 0.00

**Next** **Cancel**

Verify that all the information is correct before clicking next. This screen is also useful for correcting key contract information after initial record creation. The Status, Office, Fund, Trainer, End Date, Office Signer and Signer Name(business signer) can be corrected here, but **do not forget to save and reprint the contract if any of these data elements are changed.**

New OJT contract

Person and Business

ONET, Hours and Skills

Fund Distribution

Enhancements

Onet Code

41-2011.00

Special?

Job Title:

Cashier

View ONET Details

Zone - 2

Max Hours

480

Cashiers

Receive and disburse money in establishments other than financial institutions. May use electronic scanners, cash registers, or related equipment. May process credit or debit card transactions and validate checks.

On The Job

- Receive payment by cash, check, credit cards, vouchers, or automatic debits.
- Greet customers entering establishments.
- Issue receipts, refunds, credits, or change due to customers.

Hours/Wage Information

Start Date

03-05-2025

Wage/HR

Hrs/Wk

Add weeks

Skill Gap Information

Indiv. Rating

Benchmark

Skill Gap %

--

Adjusted Hours

Reimbursement %

Est End Date

--

Is Contract Modification?

Total Enhancements \$ 0.00

Total Contract Obligation \$ 0.00

Total Paid to Date \$ 0.00

Previous

Next

Cancel

### How Total Contract Obligation is Calculated

1. The Max Hours value is drawn from the Zone level of the selected ONET code.
2. The Wage/HR, Hrs/Wk, Indiv.Rating and Benchmark fields are required.
3. The Skill Gap % is calculated from the Indiv. Rating and Benchmark values.
4. The Adjusted Hours value comes from Max Hours x Skill Gap%
5. The Total Contract Obligation is calculated using the following formula:

$$\text{Wage/Hr} \times \text{Adjusted Hours} \times \text{Reimbursement\%} + \text{Total Enhancements}$$

Note: As you finish entering the required values you should see the **Total Contract Obligation** value. If the Total Contract Obligation still shows \$0.00, click back into the **Wage/Hr** field and tab through the fields again. This is an intermittent bug that we are trying to fix.

New OJT contract

Person and Business

ONET, Hours and Skills

Fund Distribution

Enhancements

| Item # | Description                     | Amount  | Fund | Start Date | End Date   | Status |
|--------|---------------------------------|---------|------|------------|------------|--------|
| 1      | Default Contract Funding Source | 5760.00 | LA   | 09-05-2022 | 12-13-2022 | A      |

☐ Is Contract Modification?

Total Enhancements \$ 0.00

Total Contract Obligation \$ 5760.00

Total Paid to Date \$ 0.00

Previous

Next

Cancel

Enter the end date and then click Next.

New OJT contract

Person and Business

ONET, Hours and Skills

Fund Distribution

Enhancements

Describe Enhancements (tools, clothing, etc)

New shoes (\$60.00)

New shirt with Logo (\$39.00)

Total Estimated Enhancement Cost \$

99.00

☐ Is Contract Modification?

Total Enhancements \$ 99

Total Contract Obligation \$ 5859.00

Total Paid to Date \$ 0.00

Previous

Print Invoice

Print Estimate

Print Contract

Save

Cancel

If this is an OJT, you must click save before you can print the contract.

# Contract Printing

OJT Contract

1 / 667%

DownloadPrintMore

ON-THE-JOB TRAINING CONTRACT NUMBER: 1808-LA

Between

SkillSource, 234 N Mission, WENATCHEE, WA. 98807 - 509-653-3091

And

Employer: SAFEWAY INC  
Worksite: 501 NORTH MILLER ST  
City/State/Zip: WENATCHEE, WA, 98801

And

Employee: TODD PORTZLINE (12345)

Table of Contents

Signature Page ..... Page 1  
Job Details and Payment ..... Page 2  
Agreements ..... Page 3

Attachment A: Employer Assurances  
Attachment B: General Conditions  
Attachment C: Training Outline

This contract shall commence on **September 04, 2022** and terminate on or before **December 16, 2022**. The total amount payable by **SkillSource** to the employer in consideration of the extra cost of training the Employee shall not exceed **\$5,859.00**.

The parties below are authorized to execute this contract and have agreed to this contract on the dates signed.

Employer Authorized Representative

Signature \_\_\_\_\_ Date \_\_\_\_\_

Employee  
TODD PORTZLINE (12345)

Signature \_\_\_\_\_ Date \_\_\_\_\_

SkillSource Authorized Rep.

Signature \_\_\_\_\_ Date \_\_\_\_\_

Training Consultant  
JIM ADAMSON

Signature \_\_\_\_\_ Date \_\_\_\_\_





















Page 1 of 6

JOB DETAILS

Some sections of the boilerplate can be edited using an admin function called “Contract Templates”

|                    |  |                                    |         |                 |
|--------------------|--|------------------------------------|---------|-----------------|
| Attendance         | AUTO: OFF Sticky Learner: (search to set...) |                                    |         |                 |
| Enrollment         | Contract Templates Administration            |                                    |         |                 |
| Test               | Local Code                                   | Description                        | Version |                 |
| Workshop           | INT  | INTERNSHIP                         | 1       | Download Upload |
| Office             | ITA  | INDIVIDUAL TRAINING ACCOUNT        | 1       | Download Upload |
| Business           | IWT  | INCUMBENT WORKER TRAINING          | 1       | Download Upload |
| Jobs               | OJT  | ON THE JOB TRAINING                | 1       | Download Upload |
| Contract           | INVOICE OJT                                  | ON THE JOB TRAINING                | 1       | Download Upload |
| Reports            | PWX  | WORK BASED LEARNING EXPERIENCE     | 1       | Download Upload |
| Admin              | WEX  | WORK EXPERIENCE                    | 1       | Download Upload |
| Groups             | WFP  | WORKFORCE PREPARATION - IT SUPPORT | 1       | Download Upload |
| Fund               |  |                                    |         |                 |
| Programs           |  |                                    |         |                 |
| Activity           |  |                                    |         |                 |
| Contract Templates |  |                                    |         |                 |

# Contract Template Editing

|  |  |                                    |         |   |
|--|--|------------------------------------|---------|---|
|  Jobs           | <b>Contract Templates Administration</b> |                                    |         |   |
|  Contract       | Local Code                               | Description                        | Version |   |
|  Reports ▲      | INT                                      | INTERNSHIP                         | 1       |  Download  Upload |
|  <b>Admin ▼</b> | ITA                                      | INDIVIDUAL TRAINING ACCOUNT        | 1       |  Download  Upload |
| Groups   | IWT                                      | INCUMBENT WORKER TRAINING          | 1       |  Download  Upload |
| Fund   | OJT                                      | ON THE JOB TRAINING                | 1       |  Download  Upload |
| Programs   | INVOICE OJT                              | ON THE JOB TRAINING                | 1       |  Download  Upload |
| Activity   | PWX                                      | WORK BASED LEARNING EXPERIENCE     | 1       |  Download  Upload |
| <b>Contract Templates</b>  | WEX                                      | WORK EXPERIENCE                    | 1       |  Download  Upload |
|  | WFP                                      | WORKFORCE PREPARATION - IT SUPPORT | 1       |  Download  Upload |

This is an Admin only function. Clicking the Download button will download the HTML document holding the text of the selected contract type. The person doing this updating needs to know the basics of HTML but does not need to be an HTML developer. When finished making the edits, the Upload button will enable you to send it back to the server.



# Reports

## Attendance Summary Report

**CMS** AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Attendance Reports > Attendance Summary

Print/Export

Date Range: 11-01-2020 to: 11-21-2022

All Teachers All Groups All Programs Run

| Student Name         | FTE  | Days | Days | Teacher            | Group               | Last ClockIn Date |
|----------------------|------|------|------|--------------------|---------------------|-------------------|
| AARON, HANNA         | 0.00 | 3    | 0    | TRINIDAD GUTIERREZ |                     |                   |
| ACERO, OMAR          | 0.00 | 1    | 0    | JOANNE ROBERTS     | WV18807             | 2021-04-02        |
| ADAMS, LUKE          | 1.00 | 63   | 0    | DANA OSTERLUND     | S2W                 | 2021-08-26        |
| AGUILAR BARRAGA...   | 0.00 | 24   | 0    | JOANNE ROBERTS     | WV18807             | 2021-05-10        |
| AGUILAR IBARRA, R... | 0.96 | 43   | 0    | MIKE DACEY         | SPED, OPEND, PRE... | 2021-09-03        |
| AGUILAR, JULIO       | 1.00 | 2    | 0    | DANA OSTERLUND     |                     | 2021-07-12        |
| AGUILAR, MARIA       | 0.00 | 8    | 0    | THERESA STRONG     | IC3                 | 2021-08-17        |

This report allows you to query the attendance records using any combination of selection criteria. The date range is required while **Teachers, Groups and Programs** are optional. The drop-down selection lists are multi-select, as you can see from the screen shot above. If the user selects Donna Hendrickson, then the report will be constrained to those students who attended in the date range and had Donna as their primary teacher. A learner's **primary teacher** is the Teacher that is indicated in the **Additional Information** portion of the learner's profile.

**CMS** AUTO: ON Sticky Learner: TWEEDY, SAVANNAH (142331)

Person

Attendance Enrollment Test Workshop Office Business Jobs Contract Reports Admin

< SAVANNAH TWEEDY Details

Profile Additional Open Doors Contact Info Roles/Groups

Highest Level of Education Select Highest Education

Current Employment Select Employment Status

How long in current employment status ? Select Status Duration

Trainer DONNA HENDRICKSON (SS-...)

Teacher DONNA HENDRICKSON (SS-...)

CM Level 0 1 2 3

The Groups and Programs drop-downs present options having to do with the data in the Roles/Groups tab in the screenshot above.

Also remember that you can easily add/remove columns and sort the data by clicking on a column header. Click again and it will sort the opposite way.

## The Individual Attendance Summary

The screenshot shows the CMS interface with a sidebar on the left containing various reports. The 'Individual Attendance Summary' report is selected. A modal window titled 'Choose a Start and End Date' is open in the center. The modal contains the following fields:

- Learner:** A dropdown menu with the text 'Select Learner' and a search icon.
- Start Date:** A date input field showing '11-22-2022' with a calendar icon.
- End Date:** A date input field showing '11-22-2022' with a calendar icon.
- Continue:** A blue button at the bottom of the modal.

This is the same report that you can get when you right-click on a person's record in the main results grid and select Individual Attendance Report. If you have a "sticky learner" set, then that learner will be displayed in the Learner field. If not, you can enter any part of the learners name and find them that way. For the Start Date you can set it back 24 months to capture all the attendance records since then.

This screenshot shows the 'Choose a Start and End Date' modal window with the following values entered:

- Learner:** CARRANZA TELLEZ JR, ERIK (151456)
- Start Date:** 09-01-2022
- End Date:** 09-01-2023
- Continue:** A blue button at the bottom.

### Individual Attendance Report for ERIK CARRANZA TELLEZ JR (151456)

**Report date:** 09/01/2023 10:43 PM  
**Selected Date Range:** 09-01-2022 to 09-01-2023

#### Attendance Summary

| ID     | Student Name             | Days | % of 262 | Hours    | HW | Teacher    | Program |
|--------|--------------------------|------|----------|----------|----|------------|---------|
| 151456 | CARRANZA TELLEZ JR, ERIK | 58   | 22.14    | 125.6833 | 0  | MIKE DACEY | WENSD   |

#### Daily Attendance

| Date           | Hours (h.%) | Groups      | Contact Type | Purpose     | Note                 |
|----------------|-------------|-------------|--------------|-------------|----------------------|
| Wed 01-11-2023 | 3.00        | SPED, OPEND | Face To Face | Instruction | New Student Workshop |
| Thu 01-12-2023 | 3.00        | SPED, OPEND | Face To Face | Instruction | New Student Workshop |
| Fri 01-13-2023 | 3.00        | SPED, OPEND | Face To Face | Instruction | New Student Workshop |
| Thu 01-19-2023 | 2.88        | SPED, OPEND | Face To Face | instruction |                      |
| Tue 01-24-2023 | 2.33        | SPED, OPEND | Face To Face | instruction |                      |
| Wed 01-25-2023 | 2.25        | SPED, OPEND | Face To Face | instruction |                      |

# Roster Report

CMS

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Attendance Reports > Roster Report

Print/Export

All Teachers All Groups All Programs Active Learners Only Run

☒ All Teachers  
☐ KEITH HOWARD (SS-A)  
☐ DONNA HENDRICKSON (SS-A)  
☐ JOHN ROMINE (SS-A)  
☐ MIKE DACEY (SS-A)

|        |                    | Age ↑↓ | Last Clockin ↑↓ | Reg Date ↑↓ | Session ↑↓ | Trainer ↑↓ | Groups ↑↓             |
|--------|--------------------|--------|-----------------|-------------|------------|------------|-----------------------|
|        | ADIIA              | 42     | 2020-10-22      | 2019-12-10  | A          |            | WVC5948               |
|        |                    | 32     | 2021-04-02      | 2021-04-02  | A          |            | WV18807               |
|        | N                  | 22     | 2019-07-01      | 2019-06-04  | A          |            |                       |
|        | GA...              | 29     | 2021-05-10      | 2020-12-21  | A          |            | WV18807               |
|        | R...               | 17     | 2021-09-03      | 2021-08-25  | M          | DACEY      | SPED, OPEND, PRE-E... |
| 149203 | AGUILAR, MARIA     | 41     | 2021-08-17      | 2020-03-16  | M          | LAMERS     | IC3                   |
| 138657 | AGUILAR, OTONIEL   | 26     | 2021-05-03      | 2020-12-14  | A          |            | WV18807               |
| 149455 | AMEZCUA RIOS, ANA  | 19     | 2021-05-10      | 2020-09-21  | A          |            | WV18807               |
| 149163 | ANAYA, YESENIA     | 26     | 2020-05-25      | 2020-03-02  | A          |            | WVC5734               |
| 148014 | ANGELES, GABRIELLA | 12     | 2021-09-10      | 2021-08-27  | A          | SCHRECK    | OPEND                 |
| 149615 | ARROYO, MONSERR... | 16     | 2021-03-17      | 2021-03-17  | A          |            | WV18807               |
| 148993 | ASHFORD, LEVI      | 19     | 2021-08-27      | 2021-08-25  | M          | BOBBITT    | S2W, OPEND            |
| 149768 | BAILE, LYNDESEY    | 14     | 2021-09-16      | 2021-08-25  | A          | MATAYA     | S2W, OPEND            |

This report depends on some “hidden” requirements that you must know in order to understand why certain students are **not** appearing on the Roster. I will list the more obvious first.

1. The student is not associated with the Teacher you have selected.
2. The student is not part of the Group you have selected.
3. The student is not in the Program you have selected.

The less obvious are as follows:

1. The student **MUST** have at least one attendance record **on or after** the Registration Date indicated in the Additional Information tab of the student profile
2. The student must have an Active Learner role **in your office**..
3. The student must be associated with at least one active Program.

# FTE Enrollment Report

**CMS** AUTO: ON Sticky Learner: PERSON, NEW (150387)  Welcome: LARRY

[Back to Reports](#)  
**Attendance Reports**  
Attendance Summary

Individual Attendance Summary

Roster Report

**FTE Enrollment Report**

Year-To-Date Learners Report

Student Absence Report

Upcoming Birthdays Report

Year-to-Date Attendance Report

Notes Driven Outcome Credits Report

**Attendance Reports > FTE Enrollment Report** Report Date: 11-22-2022

All Groups WENSD

| Last Name ↑↓   | First Name ↑↓ | BECCA ↑↓ | Birth Date ↑↓ | AGE ↑↓ | FTE ↑↓ | Reg Date ↑↓ | IADate ↑↓  | IARReason ↑↓          |
|----------------|---------------|----------|---------------|--------|--------|-------------|------------|-----------------------|
| AGUILAR IBARRA | ROXANA        | 0        | 01-04-2005    | 17     | 0.96   | 2021-08-25  |            |                       |
| ANGELES        | GABRIELLA     | 0        | 07-22-2010    | 12     | 0.43   | 2021-08-27  |            |                       |
| ASHFORD        | LEVI          | 0        | 07-14-2003    | 19     | 1.00   | 2021-08-25  |            |                       |
| AVILA          | JUDI          | 0        | 10-02-1993    | 29     | 1.00   | 2013-09-03  | 2014-01-16 | GED Completer         |
| BAILE          | LYNDSEY       | 0        | 04-17-2008    | 14     | 1.00   | 2021-08-25  |            |                       |
| BALDWIN        | KATIE         | 0        | 05-19-2002    | 20     | 1.00   | 2014-02-13  | 2014-11-13 | GED Completer         |
| BAUGHER        | OLIVIA        | 0        | 05-12-2003    | 19     | 1.00   | 2021-08-26  |            |                       |
| BAXTER         | AMERICUS      | 0        | 05-24-2005    | 17     | 1.00   | 2021-08-25  |            |                       |
| BERNAL         | BRIANA        | 0        | 11-13-1999    | 23     | 1.00   | 2013-11-08  | 2014-12-04 | Possibly going to ... |
| BLACK          | KAITLYNN      | 0        | 05-29-2006    | 16     | 1.00   | 2021-08-25  |            |                       |

# Year-To-Date Learners Report

**CMS** AUTO: OFF Sticky Learner: (search to set...)  Welcome: LARRY

[Back to Reports](#)  
**Attendance Reports**  
Attendance Summary

Individual Attendance Summary

Roster Report

FTE Enrollment Report

**Year-To-Date Learners Report**

Student Absence Report

Upcoming Birthdays Report

Year-to-Date Attendance Report

Notes Driven Outcome Credits Report

**Attendance Reports > Year-To-Date Learners Report**

Program Year Start Date: 07-01-2021 All Programs

×

☒ All Programs

☐ ADULT-K

☐ ADULT-M

☐ ADULT-O

☐ ADULT-W

| CMS ID ↑↓ | Full Name ↑↓         | SS ID ↑↓   |      | Last ClockIN ↑↓ | Reg Date ↑↓ | IADate ↑↓ | IARReason ↑↓ |
|-----------|----------------------|------------|------|-----------------|-------------|-----------|--------------|
| 148849    | AGUILAR IBARRA, R... | 507100464  |      | 2021-09-03      | 2021-08-25  |           |              |
| 148014    | ANGELES, GABRIELLA   | 491316264  |      | 2021-09-10      | 2021-08-27  |           |              |
| 148993    | ASHFORD, LEVI        | 131105915  |      | 2021-08-27      | 2021-08-25  |           |              |
| 149768    | BAILE, LYNDSEY       | 240605541  |      | 2021-09-16      | 2021-08-25  |           |              |
| 129077    | BALLENGER, INDIGO    | 322226453  |      | 2021-09-15      | 2021-07-28  |           |              |
| 141113    | BARRAGAN, DULCE      |            | 0.00 | 2021-09-09      | 2021-09-08  |           |              |
| 142812    | BAUGHER, OLIVIA      | 4687568377 | 1.00 | 2021-09-08      | 2021-08-26  |           |              |
| 149970    | BAXTER, AMERICUS     | 3444045391 | 1.00 | 2021-09-13      | 2021-08-25  |           |              |
| 148790    | BLACK, KAITLYNN      | 9578072649 | 1.00 | 2021-09-03      | 2021-08-25  |           |              |
| 150083    | BRADY, JOHN LOGAN    |            | 1.00 | 2021-08-27      | 2021-08-26  |           |              |

# Student Absence Report

**CMS** AUTO: OFF Sticky Learner: (search to set...) Welcome: LARRY

**Attendance Reports > Student Absence Report** Send Emails Print/Export

Student Absence Start Date: 11-01-2020 End Date: 11-30-2020 All Teachers All Groups All Programs

| Name ↑↓          | Mailing Address ↑↓   | City/State/Zip ↑↓         |
|------------------|----------------------|---------------------------|
| ABAAMRAN KHADIJA | 187110 KHADUA RD     | WENATCHEE, WA. 98807      |
| AGUILAR OTONIEL  | 181533 OTONIELING    | ROCK ISLAND, WA. 98850    |
| AMEZCUA RIOS ANA | 187680 ANA RD        | QUINCY, WA. 98848         |
| ANAYA YESENIA    | 187346 YESENIA LANE  | MANSON, WA. 98831         |
| ANGLIN GLORIA    | 129908 GLORIAY LANE  | CASHMERE, WA. 98815       |
| AVILA REYMUND    | 157252 REYMUNDY LANE | EAST WENATCHEE, WA. 98802 |
| BALLENGER INDIGO | 182164 INDIGOY LANE  | WENATCHEE, WA. 98801      |
| BARRAGAN LUIS    | 183517 LUISST STREET | E WENATCHEE, WA. 98802    |
| BAUGHER OLIVIA   | 186496 OLIVIA LANE   | WENATCHEE, WA. 98801      |

Select columns: ☒ Name ☒ Mailing Address ☒ City/State/Zip ☐ Phone ☐ Age ☐ Teacher ☐ SSLearnEmail ☐ Other Email

# Upcoming Birthdays Report

**CMS** AUTO: OFF Sticky Learner: (search to set...) Welcome: LARRY

**Attendance Reports > Upcoming Birthdays Report** Print/Export

Last Clock In Date >= 12-01-2019 Days into Future: 30 Run

| CMS ID ↑↓ | Last Name ↑↓  | First Name ↑↓ | Birth Day ↑↓ | Birth Year ↑↓ | Age ↑↓ |
|-----------|---------------|---------------|--------------|---------------|--------|
| 148580    | ROBSON        | OLIVIA        | 11-23        | 2006          | 16     |
| 142806    | GUZMAN        | ALMA          | 11-27        | 1990          | 32     |
| 149889    | BUCSKO JR     | ROBERT        | 11-27        | 2005          | 17     |
| 148206    | BLYTHE        | DONTE         | 11-28        | 2006          | 16     |
| 142740    | RINCON MERINO | GABRIEL       | 12-01        | 2004          | 18     |
| 148938    | GLUZINSKI     | GEORGE        | 12-03        | 2003          | 19     |
| 149863    | TRAIL         | ALEX          | 12-05        | 2001          | 21     |
| 140924    | KIRKHAM       | NATALEA       | 12-05        | 2003          | 19     |
| 150253    | CHAVEZ        | RICARDO       | 12-06        | 2004          | 18     |
| 149854    | BURNS         | ELIJAH        | 12-08        | 2003          | 19     |

I ran the report above on 11/22/2022

**CMS** AUTO: OFF Sticky Learner: (search to set...) Welcome: LARRY

**Attendance Reports > Year-to-Date Attendance Report** Print/Export

Start Date: 07-01-2022 End Date: 06-30-2023 All Codes SS All Contact Ty... Run

| CMS ID ↑↓ | First Name ↑↓ | Last Name ↑↓ | Type ↑↓ | Contact Ty   |
|-----------|---------------|--------------|---------|--------------|
| 142736    | EVAN          | FOSTER       | D       | Face to Face |
| 142736    | EVAN          | FOSTER       | D       | Face to Face |
| 142736    | EVAN          | FOSTER       | D       | Face to Face |
| 142736    | EVAN          | FOSTER       | D       |              |
| 142736    | EVAN          | FOSTER       | D       |              |

Dropdown menu: ☒ All Contact Types ☐ Email ☐ Text ☐ Face to face ☐ Instant messaging

# Outcome Credits Report

**CMS**  
[Back to Reports](#)  
**Attendance Reports**  
Attendance Summary  
Individual Attendance Summary  
Roster Report  
FTE Enrollment Report  
Year-to-Date Learners Report  
Student Absence Report  
Upcoming Birthdays Report  
Year-to-Date Attendance Report  
**Outcome Credits Report**

AUTO: OFF

Sticky Learner: (search to set...)

08-29-2022

08-28-2023

SS

Run

CMS ID

Last Name

First Name

Register Date

Start Date

Age at Start

Exit Date

Outcome Date

OID

Code

Credits

Notes

|        |               |               |            |            |    |            |            |     |        |      |           |
|--------|---------------|---------------|------------|------------|----|------------|------------|-----|--------|------|-----------|
| 141733 | PEREZ-HERRERA | LESLEY CELENE | 2017-12-07 | 2022-12-07 | 23 |            | 2017-11-20 | 12  | PROV   | 0.00 |           |
| 141733 | PEREZ-HERRERA | LESLEY CELENE | 2017-12-07 | 2022-12-07 | 23 |            | 2017-12-01 | 101 | BMARK  | 0.00 | Five Year |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13 | 2022-11-28 | 20 | 2023-06-26 | 2023-02-09 | 2   | CASR   | 0.00 | 220-223   |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13 | 2022-11-28 | 20 | 2023-06-26 | 2022-03-08 | 10  | EMPL   | 0.00 |           |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13 | 2022-11-28 | 20 | 2023-06-26 | 2023-05-05 | 45  | CREDIT | 0.25 | OCM100    |
| 150801 | MILLER        | ZOEY          | 2022-08-30 | 2022-08-30 | 16 | 2022-12-05 | 2022-10-26 | 55  | HSE    | 0.00 |           |
| 150801 | MILLER        | ZOEY          | 2022-08-30 | 2022-08-30 | 16 | 2022-12-05 | 2022-10-25 | 56  | HSEMTH | 1.00 | 152       |
| 150801 | MILLER        | ZOEY          | 2022-08-30 | 2022-08-30 | 16 | 2022-12-05 | 2022-10-04 | 57  | HSERLA | 1.00 | 166       |

This report produces the raw data from the Open Doors program, and can be run anytime during the year.

# CASAS Skill Gain Report

**CMS**  
[Back to Reports](#)  
**Test Tracking Reports**  
Teacher TestCode Report  
**CASAS Skill Gain Report**  
HSE / Diploma Report  
Retention / Credential Report

AUTO: OFF

Sticky Learner: (search to set...)

07-01-2020

06-30-2021

SS

Output Detail?

Include PY Applied?

Run

Number who gained one or more skills:

75 (79.79%)

Total Qualified Enrollments:

94

Math Functioning Level Gain Casas: 34 (36.17%) of 94

Read Functioning Level Gain Casas: 41 (43.62%) of 94

Total Gains: 75

Print Summary

CMS ID

Last Name

First Name

OID

Outcome Date

Incl?

|        |         |         |     |            |   |
|--------|---------|---------|-----|------------|---|
| 140845 | ARAIZA  | EDWIN   | 57  | 2020-01-09 | N |
| 140845 | ARAIZA  | EDWIN   | 2   | 2017-05-25 | Y |
| 140845 | ARAIZA  | EDWIN   | 59  | 2020-02-14 | N |
| 140845 | ARAIZA  | EDWIN   | 12  | 2017-01-18 | N |
| 140845 | ARAIZA  | EDWIN   | 44  | 2017-05-25 | N |
| 140845 | ARAIZA  | EDWIN   | 1   | 2017-08-30 | Y |
| 140845 | ARAIZA  | EDWIN   | 58  | 2019-05-11 | N |
| 140845 | ARAIZA  | EDWIN   | 10  | 2021-06-08 | N |
| 140845 | ARAIZA  | EDWIN   | 113 | 2019-10-03 | N |
| 140845 | ARAIZA  | EDWIN   | 43  | 2017-09-30 | N |
| 140924 | KIRKHAM | NATALEA | 100 | 2020-03-23 | N |
| 140924 | KIRKHAM | NATALEA | 2   | 2017-01-11 | Y |

Items 1 to 20 of 613 | Go to page: 1 / 31

74

# HSE/Diploma Report

CMS

[Back to Reports](#)

**Test Tracking Reports**

[Teacher TestCode Report](#)

[CASAS Skill Gain Report](#)

[HSE / Diploma Report](#)

[Retention / Credential Report](#)

AUTO: OFF

Sticky Learner: (search to set...)

Welcome: LARRY

**Test Tracking Reports > HSE / Diploma Report**

Reporting Year:
07-01-2020
to:
06-30-2021
SS

☒ Output Detail?
☐ Include PY Applied?
Run

Performance

18 (5.39%) of 334

6 Older Youth HSE Gains + 2 Older Youth DIP Gains + 10 Younger Youth With Gains + 316 Older Exits = 334 Total

| Outcome | Description | Younger | Older |
|---------|-------------|---------|-------|
| 3       | HSE         | 8       | 6     |
| 4       | HSD         | 2       | 2     |

Print Summary

Print/Export

| CMS ID | Last Name      | First Name | Age | Exit Date  | HSE | HSE Date   | HSD |
|--------|----------------|------------|-----|------------|-----|------------|-----|
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 141228 | ALCAIDE        | ALEXA      | 19  | 2020-07-06 | Y   |            | N   |
| 148746 | ALFARO MORALES | HECTOR     | 17  | 2021-06-14 | Y   | 2021-03-08 | N   |
| 148746 | ALFARO MORALES | HECTOR     | 17  | 2021-06-14 | Y   | 2021-03-08 | N   |
| 148746 | ALFARO MORALES | HECTOR     | 17  | 2021-06-14 | Y   | 2021-03-08 | N   |

Items 1 to 20 of 612
Go to page:
1 / 31

# Retention/Credential Report

CMS

[Back to Reports](#)

Test Tracking Reports

Teacher TestCode Report

CASAS Skill Gain Report

HSE / Diploma Report

Retention / Credential Report

AUTO: OFF

Sticky Learner: (search to set...)

Welcome: LARRY

Test Tracking Reports > Retention/Credential Report

Reporting Year: 07-01-2021 to: 06-30-2022 SS

☒ Output Detail?
 ☐ Include PY Applied?
 

Run

Number of learners 16 years old and above:

14

Retention Count: 2 (14.29%)

Credential Count: 12 (85.71%)

| OID | Description          | Type | Count | Total | Percent |
|-----|----------------------|------|-------|-------|---------|
| 10  | EMPLOYMENT           | R3   | 2     | 14    | 14.29%  |
| 12  | PROVE IT CERTIFICATE | C4   | 6     | 14    | 42.86%  |
| 100 | WORKKEYS             | C4   | 6     | 14    | 42.86%  |

Print Summary

Print/Export

| CMS ID | Last Name | First Name | IC3 Goal | Exit Date  |
|--------|-----------|------------|----------|------------|
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |
| 141275 | CHAVEZ    | LIBRADO    | N        | 2021-07-20 |

Items 1 to 20 of 101

Go to page: 1 / 6

# Upcoming Workshops Report

CMS

[Back to Reports](#)

Workshop Reports

Upcoming Workshops

Learner Workshop Enrollment

Qualifying Workshop Attendee Report

Work Readiness Attendee Report

AUTO: OFF

Sticky Learner: (search to set...)

Welcome: LARRY

Workshop Attendees

Workshops Reports > Upcoming Workshops

Start Date: 07-01-2021 End Date: 11-22-2022

Load Workshops Clear

Show Filters

Print/Export

| Workshop # | Course Title                   | Office-Room(s)     | Delivery Method | Start Date | Total Enrolled | Status |
|------------|--------------------------------|--------------------|-----------------|------------|----------------|--------|
| 11023      | ACT Youth Workshop             | SS-NO301, SS-CU240 | F2F             | 05-12-2022 | 1              | A      |
| 11022      | Adult Orientation              | SS-CU240           | F2F             | 05-31-2022 | 1              | A      |
| 11021      | Youth Orientation              | SS-CU240           | F2F             | 05-11-2022 | 0              | A      |
| 11020      | Access 2016 Level 1            | SS-CU240           | F2F             | 06-06-2022 | 1              | A      |
| 11018      | Youth Orientation              | SS-CU240           | Both            | 05-23-2022 | 0              | A      |
| 11017      | Adult Orientation              | SS-NO301           | Virtual         | 05-04-2022 | 0              | A      |
| 11013      | The Growth mindset             | SS-VR-CD           | F2F             | 09-07-2021 | 5              | A      |
| 10989      | Action For Career Emplo...     | SS-CU170           | F2F             | 10-26-2021 | 1              | A      |
| 10988      | Action For Career Emplo...     | SS-CU170           | F2F             | 10-12-2021 | 1              | A      |
| 10987      | Action For Career Emplo...     | SS-CU170           | F2F             | 09-28-2021 | 0              | A      |
| 10985      | Critical Thinking Skills fo... | SS-VR-CD           | F2F             | 07-27-2021 | 3              | A      |
| 10983      | ACT Youth Workshop             | SS-NO300           | F2F             | 12-06-2021 | 0              | A      |
| 10982      | ACT Youth Workshop             | SS-NO300           | F2F             | 11-15-2021 | 0              | A      |
| 10981      | ACT Youth Workshop             | SS-NO300           | F2F             | 11-01-2021 | 0              | A      |
| 10980      | ACT Youth Workshop             | SS-NO300           | F2F             | 10-18-2021 | 0              | A      |

Items 1 to 20 of 27

Go to page: 1 / 2



# Open Doors By Date Range Report

CMS

[Back to Reports](#)

Open Doors Reports

Open Doors By Date Range

Learner FTE

Group/Attend Driven Open Doors Report

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Open Doors Reports > Open Doors By Date Range

Start Date: 07-01-2020

End Date: 06-30-2021

Run

Print/Export

| CMS ID ↑↓ | First Name ↑↓ | Last Name ↑↓ | Time In ↑↓ | Minutes ↑↓ | Note ↑↓ |
|-----------|---------------|--------------|------------|------------|---------|
| 140924    | NATALEA       | KIRKHAM      | 08-25-2020 | 15         |         |
| 140924    | NATALEA       | KIRKHAM      | 09-03-2020 | 75         |         |
| 140924    | NATALEA       | KIRKHAM      | 09-10-2020 | 105        |         |
| 140924    | NATALEA       | KIRKHAM      | 09-11-2020 | 15         |         |
| 140924    | NATALEA       | KIRKHAM      | 02-23-2021 | 102        |         |
| 140924    | NATALEA       | KIRKHAM      | 02-24-2021 | 108        |         |
| 140925    | DOMINICK      | LUNA         | 02-08-2021 | 120        |         |
| 140925    | DOMINICK      | LUNA         | 02-09-2021 | 120        |         |
| 140925    | DOMINICK      | LUNA         | 02-11-2021 | 45         |         |
| 140925    | DOMINICK      | LUNA         | 02-16-2021 | 145        |         |
| 140925    | DOMINICK      | LUNA         | 02-17-2021 | 30         |         |
| 140925    | DOMINICK      | LUNA         | 02-18-2021 | 95         |         |
| 140925    | DOMINICK      | LUNA         | 02-23-2021 | 30         |         |
| 140925    | DOMINICK      | LUNA         | 02-25-2021 | 79         |         |
| 140925    | DOMINICK      | LUNA         | 03-04-2021 | 52         |         |
| 140925    | DOMINICK      | LUNA         | 04-01-2021 | 77         |         |
| 140925    | DOMINICK      | LUNA         | 04-21-2021 | 52         |         |

Items 1 to 20 of 4012

1

/ 201

# FTE Monthly Report

CMS

[Back to Reports](#)

Wenatchee Reports

FTE Monthly Report

Instructor Monthly Report

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Wenatchee Reports > FTE Monthly Report

Start Date: mm-dd-yyyy

End Date: mm-dd-yyyy

Select program

Possible HW Hours: 0


Run

Report Header:

Print/Export

| Name ↑↓          | Reg Date ↑↓ | TAtn ↑↓ | THw ↑↓ | THw% ↑↓ | InsHrs ↑↓ | THrs ↑↓ | Percent ↑↓ | FTE ↑↓ | AdjFTE ↑↓ | Note ↑↓ |
|------------------|-------------|---------|--------|---------|-----------|---------|------------|--------|-----------|---------|
| No records found |             |         |        |         |           |         |            |        |           |         |

# Wage-Based Contracts Report

CMS  AUTO: OFF  Sticky Learner: (search to set...) Welcome: LARRY 




Business Reports > List Wage Based Contract Report  




Run







| Contract ID | Start Date | Fund Code | Act Code | Onet Code  | Branch ID | Branch Name      | Supervisor Name   | Branch Phone | Job Title        | Wage Rate | Staff        |
|-------------|------------|-----------|----------|------------|-----------|------------------|-------------------|--------------|------------------|-----------|--------------|
| 237         | 2017-03-19 | R5        | OJT      | 49-9071.00 | 632       | 12 Tribes Re...  | Marvin Abrahamson | 5094224646   | Facility Labo... | 11.00     | GARZA-ACE... |
| 247         | 2017-04-04 | LD        | OJT      | 33-9031.00 | 632       | 12 Tribes Re...  |                   | 5094224646   | Security Offi... | 11.43     | HINGER       |
| 636         | 2018-06-14 | LO        | WEX      |            | 715       | A Point in TL... | Tom Prang         | 5096999622   | Maintenanc...    | 11.50     | MATAYA       |
| 845         | 2019-01-21 | LD        | OJT      | 53-3032.00 | 744       | AAA Ready...     | Mark Walker       | 5097651423   | Loader Ope...    | 19.00     | ROBEY        |
| 1390        | 2020-08-31 | LA        | OJT      | 53-3032.00 | 744       | AAA Ready...     | Mark Walker       | 5097651423   | Mixer Driver     | 19.50     | MORRIS       |
| 1410        | 2020-09-16 | LA        | OJT      | 53-3032.00 | 744       | AAA Ready...     | Mark Walker       | 5097651423   | Cement Tru...    | 19.50     | MORRIS       |
| 1530        | 2021-01-24 | ER        | OJT      | 53-3032.00 | 744       | AAA Ready...     |                   | 5097651423   | truck driver     | 19.50     | ADAMSON      |
| 1743        | 2021-08-18 | LD        | OJT      | 53-3032.00 | 744       | AAA Ready...     |                   | 5097651423   | concrete tru...  | 22.00     | ADAMSON      |
| 1754        | 2016-05-08 | LA        | OJT      | 43-3031.00 | 596       | ABC Service...   | Michele           | 5092890833   | Accounting ...   | 10.00     | ALLEN        |
| 199         | 2016-11-30 | LA        | OJT      | 43-4171.00 | 99        | ACCOR TEC...     | Donna Terry       | 5096620608   | Receptionist     | 13.00     | BERNSTEIN    |
| 130         | 2016-03-02 | SP        | OJT      | 43-5041.00 | 584       | Accu-Read        | John Smits        | 5096705894   | Meter Reader     | 23.09     | BERNSTEIN    |
| 980         | 2019-07-07 | PT        | PWX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Nonfarm A...     | 12.00     | GUTIERREZ    |
| 985         | 2019-07-07 | PT        | PWX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Nonfarm A...     | 12.00     | GUTIERREZ    |
| 991         | 2019-07-08 | PT        | PWX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Nonfarm A...     | 12.00     | GUTIERREZ    |
| 1340        | 2020-07-12 | PT        | PWX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Non farm A...    | 13.50     | GUTIERREZ    |
| 1341        | 2020-07-12 | PT        | PWX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Non farm a...    | 13.50     | GUTIERREZ    |
| 1437        | 2020-10-18 | LO        | WEX      |            | 769       | Adams Cou...     | Kyia Grant        | 5094885514   | Nonfarm A...     | 13.50     | GUTIERREZ    |

Items 1 to 20 of 1085 | K < > | Go to page: 1 / 55




# Admin Reports/Obligations Report 1




CMS  AUTO: OFF  Sticky Learner: (search to set...) Welcome: LARRY 







Admin Reports > Obligation Report 1   

SS  All Funds  All Activity Codes  Active  Run  




| Contract ID | CMS ID | Last Name | First Name | Start Date | End Date | REP | Total Cost | Paid To Date | Remaining Balance | Fund(s) | Activity Name | Status |
|-------------|--------|-----------|------------|------------|----------|-----|------------|--------------|-------------------|---------|---------------|--------|
|-------------|--------|-----------|------------|------------|----------|-----|------------|--------------|-------------------|---------|---------------|--------|




CMS  AUTO: OFF  Sticky Learner: (search to set...) Welcome: LARRY 







Admin Reports > Obligation Report 1   

SS  LD  ITA/OJT  Active  Run  

| Contract ID | CMS ID | Last Name | First Name | Start Date | End Date   | REP             | Total Cost | Paid To Date | Remaining Balance | Fund(s) | Activity Name | Status |
|-------------|--------|-----------|------------|------------|------------|-----------------|------------|--------------|-------------------|---------|---------------|--------|
| 2862        | 152629 | FUDGE     |            | 2024-09-25 | 2026-08-31 | MELISSA ODELL   | \$2749.52  | \$2037.52    | \$712.00          | LD      | ITA           | A      |
| 2428        | 40469  | MCCOWAN   |            | 2024-01-03 | 2026-01-01 | THERESA STRO... | \$6000.00  | \$5000.00    | \$1000.00         | LD      | ITA           | A      |
| 2691        | 152700 | REED      |            | 2024-05-15 | 2024-08-05 | TOBY HABERLOCK  | \$3140.00  | \$3140.00    | \$0.00            | LD      | OJT           | A      |
| 2816        | 96852  | SLOCUM    |            | 2024-09-23 | 2026-08-31 | MELISSA ODELL   | \$6000.00  | \$3000.00    | \$3000.00         | EA, LD  | ITA           | A      |
| 2863        | 131281 | ZAMORA    |            | 2025-01-02 | 2026-12-31 | HEIDI LAMERS    | \$3060.00  | \$612.00     | \$2448.00         | LD      | ITA           | A      |

CMS  AUTO: OFF  Sticky Learner: (search to set...) Welcome: LARRY 

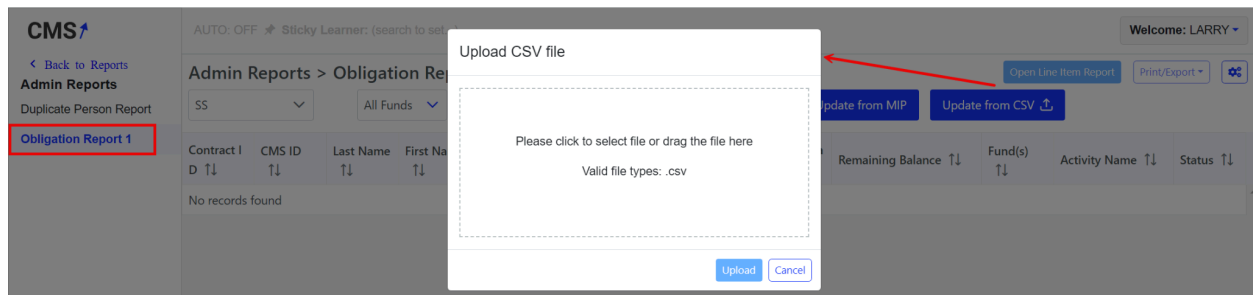
Admin Reports > Obligation Report 1   

SSSSML  All Funds  ITA  Active  Run  

| Contract ID | CMS ID | Last Name | First Name | Start Date | End Date   | REP             | Total Cost | Paid To Date | Remaining Balance | Fund(s) | Activity Name | Status |
|-------------|--------|-----------|------------|------------|------------|-----------------|------------|--------------|-------------------|---------|---------------|--------|
| 2858        | 152977 | ABOUZID   | MUHAMMAD   | 2024-09-23 | 2026-08-31 | MELISSA ODELL   | \$2520.51  | \$1520.51    | \$1000.00         | LA      | ITA           | A      |
| 2829        | 150649 | ALDAPA    | MOSES      | 2024-09-23 | 2026-08-31 | NATASHA HERR... | \$6000.00  | \$2000.00    | \$4000.00         | LA      | ITA           | A      |
| 2993        | 31517  | ALLEY     | LYLE       | 2025-02-18 | 2025-03-31 | JAMES BECK      | \$2996.26  | \$0.00       | \$2996.26         | LA      | ITA           | A      |

The **Open Line Item Report** is for contract types that have line item child records like ITAs. The Line Item Report will include all the line item data in a wide spreadsheet like table that can be easily exported to an Excel spreadsheet.

CSV upload feature for reading MIP Contract Hours to Date and Paid to Date amounts in CMS Contracts.



This feature requires a plain text csv file having the contract number, the hours and the paid amounts from MIP. The MIP report has been created and saved and can be run at any time. Currently the MIP API's do not give us access to the payroll records and so this feature gives us a way to batch upload MIP payroll data into CMS. Here are the steps involved in this process:

1. Run the saved MIP report with the desired date ranges which produces an Excel sheet with every payment made on a wage-based CMS contract. There will often be multiple rows for each contract.
2. The Excel file must be of type .xlsx and contains only three columns:  

| Distribution Code | PTD Hours | PTD Amount |
|-------------------|-----------|------------|
| 1234              | 31.5      | 465.00     |
| 1234              | 25        | 375.00     |
3. We change the headers to ContractID, Hours and Amount. We then ask ChatGPT to subtotal these and produce a downloadable csv file with the totals. The GPT prompt for this is "Subtotal the Hours and Amount by ContractID and give me a downloadable csv file named prPTD.csv"
4. Then as in the screenshot above, we click the button **Upload from CSV** and navigate to the location of the file prPTD.csv. CMS will then process this data and update each of the contracts one at a time.
5. When the process is finished a message to that effect will appear in the upper right corner with a comma-separated list of contract numbers that were changed in the process.

# Admin Reports/Duplicate Person Report

CMS

AUTO: OFF ★ Sticky Learner: (search to set...)

Admin Reports > Duplicate Person Report

SSML (dropdown) ☒ Show Marked for Delete ☒ Show Inactives ☒ Duplicate Name and Birthdate ☐ Duplicate SSNs

| First Name ↑↓ | Last Name ↑↓ | SSN ↑↓ | Birth Date ↑↓ | Status ↑↓ |
|---------------|--------------|--------|---------------|-----------|
|---------------|--------------|--------|---------------|-----------|

SSML (dropdown menu): SSML, WSOK, SS, SSOLC, SKWD

This report should be run at least weekly (but ideally at the end of each day) in order to find duplicates BEFORE a bunch of child records (workshop enrollments, attendance records, test records, etc) get added. Please notice that this report is based on Duplicate Name and Birthdate. This means two or more records with EXACTLY the same first name, last name and birthdate. **Be aware of the rare possibility that the records could be for two different people who just happen to have the same name and birthdate.**

## How do duplicate records get created?

1. By not doing a thorough search BEFORE adding a new person record. Here is what a “thorough” search looks like:
  - a. First do a search by birthdate. (This is why it is essential to collect the birth date for every participant )
  - b. Second, do a search by last name comma first name So if searching for Mary Jacobs the entry would look like this: **Jacobs, Mary**
  - c. Third, to a search by last name comma first initial. So the search entry would look like this: **Jacobs, M** . The reason for this is to catch records where the first name is misspelled.
2. By scenarios like the following: The person first came to us many years ago using their maiden name, but now they are married or they have been through a formal name-change process. This is why you should always ask “Have you ever been to our office before and if so, what name did you use?” When this occurs, we need to make sure we update the name and make sure the birth date and at least the last four digits of their social security number are entered correctly.

Note: You might be tempted to say “In the heat of a busy front desk (five minutes before the workshop starts), I do not have time to do a thorough search before adding a new record. That is why this Duplicate Person Report exists. At the end of the day, after you have locked the front door, run this report for your office to help find duplicate records as soon as possible.

When records appear in the grid after running this report, there are right-click menu options for dealing with them.

# Admin

## Programs

|   |  |   |                                       |        |                |                   |
|---|--|---|---------------------------------------|--------|----------------|-------------------|
| <div><div>CMS</div><div>Person</div><div>Attendance</div><div>Enrollment</div><div>Test</div><div>Workshop</div><div>Office</div><div>Business</div><div>Contract</div><div>Reports</div><div>Admin</div><div>Groups</div><div>Fund</div><div>Programs</div><div>Activity</div></div> | AUTO: OFF Sticky Learner: (search to set...) |   |                                       |        | Welcome: LARRY |                   |
|   | Program Code Administration                  |   |                                       |        |                | + Add new         |
|   | All offices                                  |   |                                       |        |                |                   |
|   | Code   | Program Name                            | Office                                | Status |                |                   |
|   | ADULT-K                                      | Adult Program Omak                      | WORKSOURCE - OKANOGAN                 | A      | Delete         |                   |
|   | ADULT-M                                      | Adult Program Moses Lake                | SKILLSOURCE - MOSES LAKE              | A      | Delete         |                   |
|   | ADULT-O                                      | Adult Program Othello                   | SKILLSOURCE - OTHELLO LEARNING CENTER | A      | Delete         |                   |
|   | ADULT-W                                      | Adult Program Wenatchee                 | SKILLSOURCE - WENATCHEE               | A      | Delete         |                   |
|   | BBCC   | Big Bend Community College - Moses Lake | SKILLSOURCE - MOSES LAKE              | A      | Delete         |                   |
|   | BBCC-O                                       | Big Bend Community College - Othello    | SKILLSOURCE - OTHELLO LEARNING CENTER | A      | Delete         |                   |
|   | BRISD  | Bridgeport School District              | WORKSOURCE - OKANOGAN                 | A      | Delete         |                   |
|   | BRSD   | Brewster School District                | WORKSOURCE - OKANOGAN                 | A      | Delete         |                   |
|   | IC3WEN                                       | Wenatchee IC3 Program                   | SKILLSOURCE - WENATCHEE               | A      | Delete         |                   |
|   | MLSD   | Moses Lake School District              | SKILLSOURCE - MOSES LAKE              | A      | Delete         |                   |
|   | OKSD   | Okanogan School District                | WORKSOURCE - OKANOGAN                 | A      | Delete         |                   |
|   | OTHER-M                                      | Special Programs Moses Lake             | SKILLSOURCE - MOSES LAKE              | A      | Delete         |                   |
|   | OTHSD  | Othello School District                 | SKILLSOURCE - OTHELLO LEARNING CENTER | A      | Delete         |                   |
|   | WENSD  | Wenatchee School District               | SKILLSOURCE - WENATCHEE               | A      | Delete         |                   |
|   | Items 1 to 15 of 15                          |   |                                       |        |                | Go to page: 1 / 1 |

## Groups

|   |  |  |        |        |                |                   |
|---|--|--|--------|--------|----------------|-------------------|
| <div><div>CMS</div><div>Person</div><div>Attendance</div><div>Enrollment</div><div>Test</div><div>Workshop</div><div>Office</div><div>Business</div><div>Contract</div><div>Reports</div><div>Admin</div><div>Groups</div><div>Fund</div><div>Programs</div><div>Activity</div></div> | AUTO: OFF Sticky Learner: (search to set...) |  |        |        | Welcome: LARRY |                   |
|   | Group Code Administration                    |  |        |        |                | + Add new         |
|   | Code   | Group Name                             | Status |        |                |                   |
|   | ABE  | Adult Basic Ed                         | A      | Delete |                |                   |
|   | ABY  | Basic Skills for Youth                 | A      | Delete |                |                   |
|   | ALE  | Alternative Learning Experience        | A      | Delete |                |                   |
|   | BBCCBIM                                      | BBCC BUSINESS INFORMATION MANAGEMENT   | A      | Delete |                |                   |
|   | BBCCBUS                                      | BBCC Manufacturing Clerk               | A      | Delete |                |                   |
|   | BBCCGED                                      | Big Bend GED                           | A      | Delete |                |                   |
|   | BBCCINC                                      | BBCC INCOMPLETE                        | A      | Delete |                |                   |
|   | CRED   | Credit Catch-up                        | A      | Delete |                |                   |
|   | IC3  | IC3 Group                              | A      | Delete |                |                   |
|   | MLADL  | Advanced Digital Literacy - Moses Lake | A      | Delete |                |                   |
|   | MLBECCA                                      | Moses Lake BECCA                       | A      | Delete |                |                   |
|   | MLCBSS                                       | Columbia Basin Secondary School        | A      | Delete |                |                   |
|   | MLCMMS                                       | Chief Moses Middle School              | A      | Delete |                |                   |
|   | MLFMS  | Frontier Middle School                 | A      | Delete |                |                   |
|   | MLHS   | Moses Lake High School                 | A      | Delete |                |                   |
|   | MSDL   | Digital Literacy                       | A      | Delete |                |                   |
|   | Items 1 to 20 of 63                          |  |        |        |                | Go to page: 1 / 4 |

# Funds

- Person
- Attendance
- Enrollment
- Test
- Workshop
- Office
- Business
- Contract
- Reports
- Admin**
- Groups
- Fund**
- Programs
- Activity

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Fund Administration [+ Add new](#)

| Fund Code | Description                   | State Code | Start Date | End Date   | Status |        |
|-----------|-------------------------------|------------|------------|------------|--------|--------|
| CA        | CAREER CONNECT ADULT          |            | 02-28-2018 | 02-28-2019 | A      | Delete |
| CI        | CAREER CONNECT IN-SCHOOL      |            | 02-28-2018 | 02-28-2019 | A      | Delete |
| CO        | CAREER CONNECT OUT-SCHOOL     |            | 02-28-2018 | 02-28-2019 | A      | Delete |
| DR        | NDWG DISASTER RECOVERY        |            | 06-30-2020 | 06-29-2022 | A      | Delete |
| ER        | EMPLOYMENT RECOVERY           |            | 06-30-2020 | 06-29-2022 | A      | Delete |
| GF        | GENERAL FUND                  |            | 03-31-2019 | 04-29-2019 | A      | Delete |
| HR        | HUNGER RELIEF STAFFING        |            | 07-26-2021 |            | A      | Delete |
| JD        | WIA NEG JOB DRIVEN            |            | 12-30-1969 | 12-30-1969 | I      | Delete |
| LA        | WIA ADULT                     |            |            |            | A      | Delete |
| LD        | WIA DISLOCATED WORKER         |            |            |            | A      | Delete |
| LI        | WIA IN SCHOOL YOUTH           |            |            |            | A      | Delete |
| LO        | WIA OUT OF SCHOOL YOUTH       |            |            |            | A      | Delete |
| LT        | WIA RRAA LONG TERM UNEMPLOYED |            |            |            | I      | Delete |
| N3        | WIA NEG DWT                   |            |            |            | I      | Delete |
| OW        | SCSEP                         |            | 06-30-2017 | 06-29-2018 | A      | Delete |
| PT        | PREETS                        |            | 04-30-2019 | 09-29-2021 | A      | Delete |

Items 1 to 20 of 25


Go to page:  / 2

This Fund code table is managed by our accountant and it makes possible some real-time control over the contracting system. If any part of a contract's duration falls outside the start-date/end-date range of the fund associated with it, the user will get a message about it and be prevented from further processing. This check happens only on Fund Codes that have a start and end date. If a record has a start date but no end date, then contracts will be prevented that start before the fund start date.

# Activity

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Groups

Fund

Programs

Activity

AUTO: OFF Sticky Learner: (Search to set...)

Welcome: LARRY

Activity Administration

Local Code

Description

State Code

Status

|     |                             |    |   |        |
|-----|-----------------------------|----|---|--------|
| ABE | ADULT BASIC EDUCATION       |    | I | Delete |
| ACC | ACCELERATED LEARNING        |    | I | Delete |
| AOE | AUTOMATED OFFICE SKILLS     | FF | I | Delete |
| AOY | AUTOMATED OFFICE SKILLS     |    | I | Delete |
| BSK | BASIC SKILLS                |    | I | Delete |
| CBS | COMPUTER BASIC SKILLS       |    | I | Delete |
| CET | CUSTOMIZED TRAINING         |    | I | Delete |
| ENH | WORKBASED ENHANCEMENT       |    | I | Delete |
| ENT | ENTREPRENEURIAL TRAINING    |    | I | Delete |
| GED | GENERAL EQUIVALENCY DIPLOMA |    | I | Delete |
| INT | INCENTIVE                   |    | A | Delete |
| IST | CLASSROOM TRAINING          |    | I | Delete |
| ITA | INDIVIDUAL TRAINING ACCOUNT |    | A | Delete |
| IWT | INCUMBENT WORKER TRAINING   |    | A | Delete |
| OIT | OCCUPATIONAL INTERNSHIP     |    | I | Delete |
| OJT | ON THE JOB TRAINING         |    | A | Delete |

Items 1 to 20 of 25

1

2

All contracts must be associated with an active Activity code. The codes with an “I” for Inactive will not show up on the drop-downs in the contract entry/edit screens. The contract type is associated with one of these activity codes and the contract entry/edit wizards behave differently for each activity. Different data is collected and different signable contracts generated depending on the associated activity. There is another admin feature called Contract Templates Administration that enables some simple editing of the boilerplate language on the printed contracts.

# Contract Templates Administration

| Local Code  | Description                        | Version |   |
|-------------|------------------------------------|---------|---|
| INT         | INTERNSHIP                         | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| ITA         | INDIVIDUAL TRAINING ACCOUNT        | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| IWT         | INCUMBENT WORKER TRAINING          | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| OJT         | ON THE JOB TRAINING                | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| INVOICE OJT | ON THE JOB TRAINING                | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| PWX         | WORK BASED LEARNING EXPERIENCE     | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| WEX         | WORK EXPERIENCE                    | 1       | <a href="#">Download</a> <a href="#">Upload</a> |
| WFP         | WORKFORCE PREPARATION - IT SUPPORT | 1       | <a href="#">Download</a> <a href="#">Upload</a> |

This screen enables admin staff to make minor changes to the contract templates (boilerplate) without having to go to the programmers. However, these downloadable templates are **HTML documents**, requiring the editors to have some very basic HTML knowledge. To put it another way, the editors simply need to know not to change any HTML codes. The following is an example of such a document for the Internship agreement where the red outlined text is what could be edited:

```
</head>
<body>
  <div id="mainContent">
    <div id="page1" class="page" style="padding-top:40px;">
      @if ($data->contract->modNumber != 0)
        <div id="revisionInfo">
          <span class="label">Revision #:</span><span class='data'
            style="width:50px;">{{ $data->contract->modNumber }}</span>
          <span class="label">Revision Date:</span><span class='data'>{{ $data->lastModDate }}</span>
        </div>
      @endif
      <div class="section-header center">
        <h3 style="margin-bottom:0">{{ $data->activity->activityDescription }} AGREEMENT</h3>
      </div>
      <p>The purpose of this agreement is to provide the Trainee with an opportunity for career exploration and skill
        development. The parties entering into this agreement are:</p>
      <div class="fullSigLine"><b>{{ $data->branch->branchName }}</b>
        <div class="noblock">, hereinafter referred to as BUSINESS,</div>
      </div>
      <div class="fullSigLine"><b>{{ $data->person->fullname }}</b>
        <div class="noblock">, hereinafter referred to as TRAINEE, and SkillSource.</div>
      </div>
      <div class="fullSigLine">This agreement begins <b class="underline">{{ $data->startDate }}</b> and ends <b
        class="underline">{{ $data->endDate }}</b> or after <b
        class="underline">{{ $data->contract->totalHours }}</b> hours worked, whichever comes first.
      </div>
      @php use App\Enums\Contract\ContractTypeEnum; @endphp
      <div class="section-header" style="padding-top:15px;padding-bottom:15px">A. Business agrees to:</div>
      <ol class="agreeOL">
        <li>Teach Trainee assigned tasks (Attachment C: Training Plan).</li>
        <li>Evaluate Trainee's competence performing assigned tasks (Attachment C Training Plan).</li>
      </ol>
    </div>
  </div>
```

The section in red above is enclosed in HTML paragraph tags **<p>...</p>**. Three lines from the bottom you see an HTML ordered list tag **<ol>**. And a list has one or more HTML line item tags **<li>...</li>**. If the edit involved adding a new line item, then a new set of tags would need to be added as well. Most HTML tags are entered as pairs: an opening tag **<li>** and a closing tag **</li>**. So you have just learned all the HTML you need to know!



# Test Codes

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Contract

Reports

Admin

Groups

Fund

Programs

Activity

Test Codes

Ed Level Ranges

AUTO: OFF Sticky Learner: (search to set...)

Welcome: LARRY

Test Codes Administration

Test ID

Cat ID

Outcome ID

Test Code

Test Name

Passing Score

Status

|    |    |     |           |                            |        |   |        |
|----|----|-----|-----------|----------------------------|--------|---|--------|
| 45 | 16 |     | WKAPTECH  | WORKKEYS APPLIED TECH...   | 1.00   | I | Delete |
| 46 | 16 |     | WKBWRITE  | WORKKEYS BUSINESS WR...    | 1.00   | I | Delete |
| 47 | 16 |     | WKLISTEN  | WORKKEYS LISTENING         | 1.00   | I | Delete |
| 48 | 16 | 100 | WKLOCATE  | WORKKEYS GRAPHIC LITE...   | 4.00   | A | Delete |
| 49 | 16 | 100 | WKMATH    | WORKKEYS APPLIED MATH      | 4.00   | A | Delete |
| 50 | 16 |     | WKOBSERVE | WORKKEYS OBSERVATION       | 1.00   | X |        |
| 51 | 16 | 100 | WKREAD    | WORKKEYS WORKPLACE ...     | 4.00   | A | Delete |
| 52 | 16 |     | WKTEAM    | WORKKEYS TEAMWORK          | 1.00   | A | Delete |
| 56 | 7  | 56  | HSEMTH    | HSE MATH EXAM              | 145.00 | A | Delete |
| 57 | 7  | 57  | HSERLA    | HSE READING LANGUAGE...    | 145.00 | A | Delete |
| 58 | 7  | 58  | HSESCI    | HSE SCIENCE EXAM           | 145.00 | A | Delete |
| 59 | 7  | 59  | HSESOC    | HSE SOCIAL STUDIES EXAM    | 145.00 | A | Delete |
| 60 | 13 |     | PHSEMTH   | PRE HSE MATH TEST          | 145.00 | A | Delete |
| 61 | 13 |     | PHSERLA   | PRE HSE READING TEST       | 145.00 | A | Delete |
| 62 | 13 |     | PHSESCI   | PRE HSE SCIENCE TEST       | 145.00 | A | Delete |
| 63 | 13 |     | PHSESOC   | PRE HSE SOCIAL STUDIES ... | 145.00 | A | Delete |

Items 41 to 60 of 73

Go to page:

3

/ 4

This table defines the tests that the Test Tracking system uses. Let's take HSEMTH for example. Notice that the passing score is 145. This can be edited when the passing score changes. Also note the column labeled **Outcome ID**. If there is an outcome earned when passing the test, there will be a number in this column. The Outcome ID for HSEMTH is 56. The outcome record is automatically added to the Enrollment Outcome table when this test is passed.

# EdLevel Ranges

|  |  |         |            |          |             |           |        |                           |
|--|--|---------|------------|----------|-------------|-----------|--------|---------------------------|
| <div>CMS</div> <ul style="list-style-type: none"> <li>Person</li> <li>Attendance</li> <li>Enrollment</li> <li>Test</li> <li>Workshop</li> <li>Office</li> <li>Business</li> <li>Contract</li> <li>Reports</li> <li>Admin</li> <li>Groups</li> <li>Fund</li> <li>Programs</li> <li>Activity</li> <li>Test Codes</li> <li>Ed Level Ranges</li> </ul> | AUTO: ON <span>Sticky Learner: PERSON, NEW (150387)</span> |         |            |          |             |           |        | Welcome: LARRY            |
|  | Ed Level Ranges Administration                             |         |            |          |             |           |        | <a href="#">+ Add new</a> |
|  | Range ID   | Test ID | Test Code  | Level ID | Range Start | Range End | Status |                           |
|  | 1  | 1       | ABLE-LANG  | 1        | 0.00        | 1.90      | A      | <a href="#">Delete</a>    |
|  | 32   | 1       | ABLE-LANG  | 2        | 2.00        | 3.90      | A      | <a href="#">Delete</a>    |
|  | 62   | 1       | ABLE-LANG  | 4        | 7.00        | 95.00     | A      | <a href="#">Delete</a>    |
|  | 61   | 1       | ABLE-LANG  | 6        | 59.99       | 60.00     | A      | <a href="#">Delete</a>    |
|  | 49   | 5       | CASAS-MATH | 1        | 0.00        | 193.00    | A      | <a href="#">Delete</a>    |
|  | 50   | 5       | CASAS-MATH | 2        | 194.00      | 203.00    | A      | <a href="#">Delete</a>    |
|  | 51   | 5       | CASAS-MATH | 3        | 204.00      | 214.00    | A      | <a href="#">Delete</a>    |
|  | 52   | 5       | CASAS-MATH | 4        | 215.00      | 225.00    | A      | <a href="#">Delete</a>    |
|  | 53   | 5       | CASAS-MATH | 5        | 226.00      | 235.00    | A      | <a href="#">Delete</a>    |
|  | 54   | 5       | CASAS-MATH | 6        | 236.00      | 999.00    | A      | <a href="#">Delete</a>    |
|  | 55   | 6       | CASAS-READ | 1        | 0.00        | 203.00    | A      | <a href="#">Delete</a>    |
|  | 56   | 6       | CASAS-READ | 2        | 204.00      | 216.00    | A      | <a href="#">Delete</a>    |
|  | 57   | 6       | CASAS-READ | 3        | 217.00      | 227.00    | A      | <a href="#">Delete</a>    |
|  | 58   | 6       | CASAS-READ | 4        | 228.00      | 238.00    | A      | <a href="#">Delete</a>    |
|  | 59   | 6       | CASAS-READ | 5        | 239.00      | 248.00    | A      | <a href="#">Delete</a>    |
|  | 60   | 6       | CASAS-READ | 6        | 249.00      | 999.00    | A      | <a href="#">Delete</a>    |

This table holds the data necessary for calculating an Educational Function Level (EFL). A level is associated with a range. For CASAS-MATH, for example, if the student scores between 204 and 214, their EFL is 3.

# School Days

AUTO: OFF ★ Sticky Learner: (search to set...)

### School Days Administration

WENSD

Current School Days (Total: 31)

December 2022

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
|    |    |    |    | 1  | 2  | 3  |
| 4  | 5  | 6  | 7  | 8  | 9  | 10 |
| 11 | 12 | 13 | 14 | 15 | 16 | 17 |
| 18 | 19 | 20 | 21 | 22 | 23 | 24 |
| 25 | 26 | 27 | 28 | 29 | 30 | 31 |

Incl Weekends: ☐

Set Hours: 0

Set

Current Hours: 0

Selected Dates:

Start Date: 2022-12-29

End Date: 2022-12-29

Generate for Year:

Run Auto Generate

This is where the system defines what constitutes a school day for each specific program code. Generally we consider a typical school day to be 4 hours. School vacation days can be recorded using this functionality. This information is important for automated FTE calculations.

This must be maintained on a yearly basis for each program. Each learning center administrator should make sure this maintenance is done on a timely basis if CMS is being depended on for FTE calculations.

# Roles

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Jobs

Contract

Reports

Admin

Groups

Fund

Programs

Activity

Test Codes

EdLevel Ranges

School Days

Roles

AUTO: OFF

Sticky Learner: (search to set...)

Welcome: LARRY

Role Administration

Add new

| Role         | Status |        |
|--------------|--------|--------|
| TRAINER      | A      | Delete |
| SEEKER       | A      | Delete |
| INSTRUCTOR   | A      | Delete |
| COUNSELOR    | A      | Delete |
| ADMIN        | A      | Delete |
| MANAGER      | A      | Delete |
| STAFF        | A      | Delete |
| LEARNER      | A      | Delete |
| CMSADMIN     | A      | Delete |
| XSTAFF       | A      | Delete |
| WKS-SCHEDLR  | A      | Delete |
| WIA-ENROLLED | A      | Delete |
| TEACHER      | A      | Delete |
| LCADMIN      | A      | Delete |
| OFFICESIGNE  | A      | Delete |
| PROPERTY-MGR | A      | Delete |
| T            | X      |        |

## Role

ADMIN  
 CMSADMIN  
 COUNSELOR  
 INSTRUCTOR  
 LCADMIN  
 LEARNER  
 MANAGER  
 OFFICESIGNE  
 SEEKER  
 STAFF  
 TEACHER  
 TRAINER  
 WKS-SCHEDLR  
 XSTAFF

## Function

Office admin menu items and permissions  
 FULL admin access regardless of login office  
 Currently undefined  
 Workshop instructor  
 Learning center admin  
 Attendance and Test records enabled  
 More rights than staff by office  
 Person in the office that signs contracts (Only one)  
 All Person records get this role by default  
 General staff menus and permissions  
 Learning center teacher  
 Training rep access and permissions  
 Able to create new workshops  
 For staff access to offices other than their own

# Excuses

≡

CMS

Person

Attendance

Enrollment

Test

Workshop

Office

Business

Jobs

Contract

Reports

Admin

Groups

Fund

Programs

Activity

Test Codes

EdLevel Ranges

School Days

Roles

Excuses

Drop Codes

Exclude Codes

AUTO: OFF ⚙️ Sticky Learner: (search to set...)

Welcome: LARRY

Absence Excuse Administration

+ Add new

All Offices

| Excuse                      | Office                   | Excused?                            | Status |        |
|-----------------------------|--------------------------|-------------------------------------|--------|--------|
| Justifiable Personal Reason | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Disciplinary Reasons        | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Employment Related          | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Other                       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Transportation Issues       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Out Of Town                 | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Absence                     | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Absence                     | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Tardy                       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Tardy                       | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Other                       | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Medical/Dental appointment  | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Exc4                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Exc5                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Exc7                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Unexc1                      | SKILLSOURCE - MOSES LAKE | <input type="checkbox"/>            | A      | Delete |
| Unexc2                      | SKILLSOURCE - MOSES LAKE | <input type="checkbox"/>            | A      | Delete |

Items 1 to 20 of 34

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Go to page: 

1

 / 2

# Drop Codes

**CMS** AUTO: OFF Sticky Learner: (search to set...) Welcome: LARRY

**Absence Excuse Administration** + Add new

All Offices

| Excuse                      | Office                   | Excused?                            | Status |        |
|-----------------------------|--------------------------|-------------------------------------|--------|--------|
| Justifiable Personal Reason | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Disciplinary Reasons        | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Employment Related          | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Other                       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Transportation Issues       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Out Of Town                 | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Absence                     | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Absence                     | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Tardy                       | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Tardy                       | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Other                       | GENERAL                  | <input type="checkbox"/>            | A      | Delete |
| Medical/Dental appointment  | GENERAL                  | <input checked="" type="checkbox"/> | A      | Delete |
| Exc4                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Exc5                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Exc7                        | SKILLSOURCE - MOSES LAKE | <input checked="" type="checkbox"/> | A      | Delete |
| Unexc1                      | SKILLSOURCE - MOSES LAKE | <input type="checkbox"/>            | A      | Delete |
| Unexc2                      | SKILLSOURCE - MOSES LAKE | <input type="checkbox"/>            | A      | Delete |

Items 1 to 20 of 34 | < > Go to page: 1 / 2

# Exclude Codes

**CMS** AUTO: OFF Sticky Learner: (search to set...) Welcome: LARRY

**Exclude Codes Administration** + Add new

All Offices

| Exclude Code | Reason            | Office                   | Status |        |
|--------------|-------------------|--------------------------|--------|--------|
| INST         | INSTITUTIONALIZED | SKILLSOURCE - MOSES LAKE | A      | Delete |
| MEDICAL      | MEDICAL           | GENERAL                  | A      | Delete |
| FAMILY       | FAMILY CARE       | GENERAL                  | A      | Delete |
| ADUTY        | ACTIVE DUTY       | GENERAL                  | A      | Delete |
| DEATH        | DECEASED          | GENERAL                  | A      | Delete |
| rrr          | rrr               | SKILLSOURCE - MOSES LAKE | A      | Delete |
| ppp          | ppp               | GENERAL                  | A      | Delete |
| pp           | pp                | SKILLSOURCE - MOSES LAKE | A      | Delete |
| re           | erer              | SKILLSOURCE - MOSES LAKE | A      | Delete |
| Exxx         | test              | GENERAL                  | A      | Delete |

Items 1 to 10 of 10 | < > Go to page: 1 / 1

# CMS User Maintenance Roles and Responsibilities

## Creating a New Staff User

- Overview. This role can and probably should be distributed to each of the offices but it can also be centrally managed by the main office (Wenatchee Skillsource). The role is important for the following reasons.
  1. New staff users depend on the timely completion of this task in order to do their jobs.
  2. STAFF users have access to an enormous amount of sensitive personal information on Skillsource participants.
  3. A STAFF person can have many roles depending on their job requirements. These roles will need to be added after their record is created.
  4. You can use the placeholder date of '01-01-1900' for the staff person's date of birth.

## Deactivating A Staff User

- Overview. This role can and probably should be distributed to each of the offices but it can also be centrally managed by the main office (Wenatchee Skillsource). The role is important for the following reasons.
  1. It is a significant security risk for former employees to continue to have access to CMS after leaving employment, unless they happen to be someone who is still needed as a part-time employee.
  2. STAFF users have access to an enormous amount of sensitive personal information on Skillsource participants.
  3. Each of the roles that were assigned will need to be individually set to "inactive" when they leave. **It is not enough to simply set their 'person' record to inactive.**

## Roles Maintenance Screen

**LARRY HENDERSON Details**

[Add Google Acct](#) [Notes](#) [Save](#) [Cancel](#) [Delete](#)

Profile Additional Open Doors Contact Info **Roles/Groups**

When editing the Status of a current role, use the little pencil icon

| Office ↑↓                    | Role ↑↓      | Status ↑↓ | PRID ↑↓ | Last updated ↑↓ |  |
|------------------------------|--------------|-----------|---------|-----------------|--|
| SKILLSOURCE - OTHELLO LEA... | XSTAFF       | I         | 88522   | 10-31-2023      |  |
| SKILLSOURCE - OTHELLO LEA... | WKS-SCHEDLR  | I         | 88524   | 10-31-2023      |  |
| SKILLSOURCE - WENATCHEE      | LEARNER      | I         | 95132   | 12-01-2023      |  |
| SKILLSOURCE - WENATCHEE      | PROPERTY-MGR | X         | 151066  | 10-31-2023      |  |

When adding a new role, use these drop down menus

Office  Role  Status  [Add Role](#)

I want to change the Property MGR back to 'A' for Active. When I click on the pencil I see the following change to the screen:

|                         |              |   |        |            |              |
|-------------------------|--------------|---|--------|------------|--------------|
| SKILLSOURCE - WENATCHEE | LEARNER      | I   | 95132  | 12-01-2023 |              |
| SKILLSOURCE - WENATCHEE | PROPERTY-MGR | <div><div>Select status</div><div>Active</div><div>Inactive</div><div>Deleted</div></div> | 151066 | 10-31-2023 | <div> </div> |

Group Code ↑↓ Group Name ↑↓ Status ↑↓ Last updated ↑↓

Click 'X' to Cancel the current operation. I will select 'Active' from the Status dropdown. And then, in order for the change to be written to the database, you must click the checkmark icon. Note: This does **NOT** mean you do not still need to press the blue **Save** button to save all the other changes you may have made to the profile.

**LARRY HENDERSON Details**

[Add Google Acct](#) [Notes](#) [Save](#) [Cancel](#) [Delete](#)

Profile Additional Open Doors Contact Info **Roles/Groups**

| Office ↑↓                    | Role ↑↓      | Status ↑↓ | PRID ↑↓ | Last updated ↑↓ |  |
|------------------------------|--------------|-----------|---------|-----------------|--|
| SKILLSOURCE - OTHELLO LEA... | XSTAFF       | I         | 88522   | 10-31-2023      |  |
| SKILLSOURCE - OTHELLO LEA... | WKS-SCHEDLR  | I         | 88524   | 10-31-2023      |  |
| SKILLSOURCE - WENATCHEE      | LEARNER      | I         | 95132   | 12-01-2023      |  |
| SKILLSOURCE - WENATCHEE      | PROPERTY-MGR | A         | 151066  | 04-08-2024      |  |



# Using Excel Pivot Tables to Enhance CMS Reports

See the following tutorial: [Pivot Table Tutorial](#)

Let's use the Outcome Credits Report under Attendance Reports for this example.

| CMS ID | Last Name     | First Name    | Register Date | Start Date | Age at Start | Exit Date  | Outcome Date | OID | Code   | Credits | Notes     |
|--------|---------------|---------------|---------------|------------|--------------|------------|--------------|-----|--------|---------|-----------|
| 141733 | PEREZ-HERRERA | LESLEY CELENE | 2017-12-07    | 2022-12-07 | 23           |            | 2017-11-20   | 12  | PROV   | 0.00    |           |
| 141733 | PEREZ-HERRERA | LESLEY CELENE | 2017-12-07    | 2022-12-07 | 23           |            | 2017-12-01   | 101 | BMARK  | 0.00    | Five Year |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13    | 2022-11-28 | 20           | 2023-06-26 | 2023-02-09   | 2   | CASR   | 0.00    | 220-223   |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13    | 2022-11-28 | 20           | 2023-06-26 | 2022-03-08   | 10  | EMPL   | 0.00    |           |
| 150589 | VERDUZCO      | OLIVIA        | 2022-11-13    | 2022-11-28 | 20           | 2023-06-26 | 2023-05-05   | 45  | CREDIT | 0.25    | OCM100    |
| 150801 | MILLER        | ZOEY          | 2022-08-30    | 2022-08-30 | 16           | 2022-12-05 | 2022-10-26   | 55  | HSE    | 0.00    |           |
| 150801 | MILLER        | ZOEY          | 2022-08-30    | 2022-08-30 | 16           | 2022-12-05 | 2022-10-25   | 56  | HSEMTH | 1.00    | 152       |
| 150801 | MILLER        | ZOEY          | 2022-08-30    | 2022-08-30 | 16           | 2022-12-05 | 2022-10-04   | 57  | HSERLA | 1.00    | 166       |
| 150801 | MILLER        | ZOEY          | 2022-08-30    | 2022-08-30 | 16           | 2022-12-05 | 2022-09-28   | 58  | HSESCI | 1.00    | 170       |
| 150801 | MILLER        | ZOEY          | 2022-08-30    | 2022-08-30 | 16           | 2022-12-05 | 2022-09-21   | 59  | HSESOC | 1.00    | 164       |
| 151074 | SPENCER       | JAYDN         | 2022-08-29    | 2022-08-30 | 16           | 2023-04-11 | 2023-01-18   | 1   | CASM   | 0.00    | 247       |

The date range we are using is the entire Open Doors school year starting in August of 2022. We have selected the office SS (SkillsSource Wenatchee).

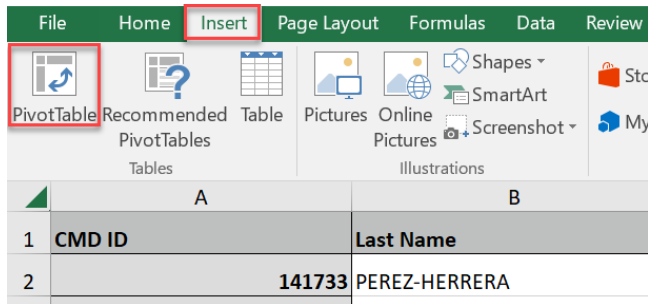
Print/Export

- Print
- Excel
- Word
- Export Mailing Labels CSV

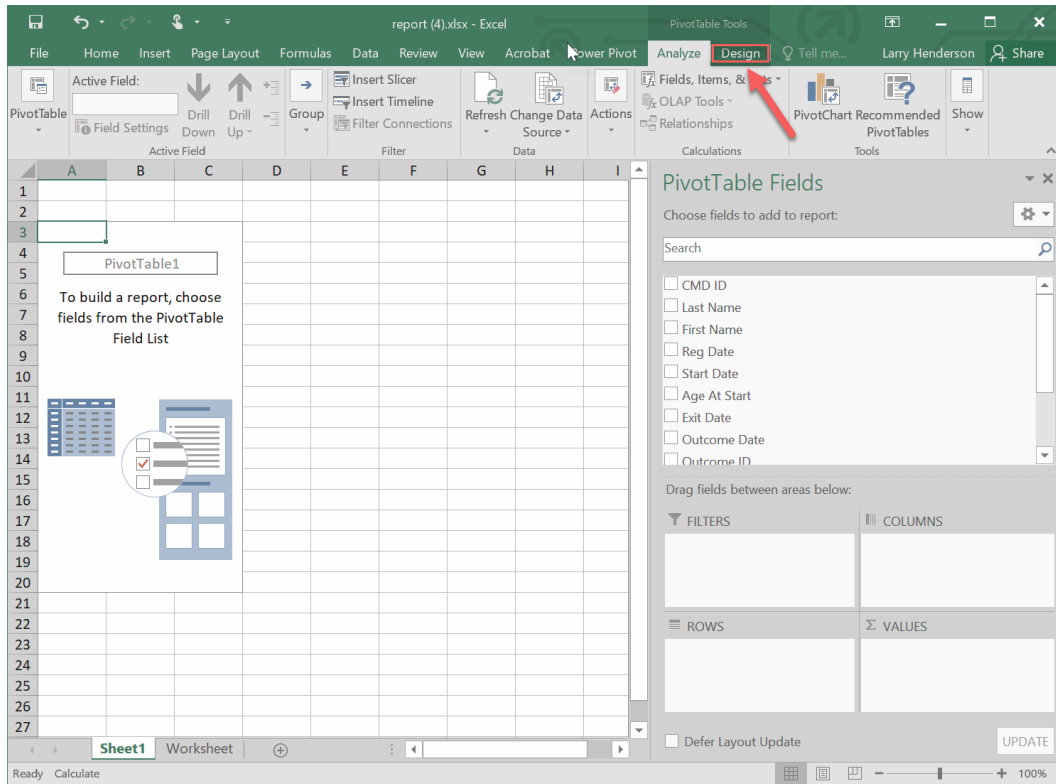
We want to Export this report to Excel. This will create an Excel file called "Report". Here is what this will look like when opened in Excel. You will need to click the yellow button that says "Enable Editing"

| CMD ID | Last Name                          | First Name    | Reg Date   | Start Date | Age At Start | Exit Date  | Outcome Date | Outcome ID | Code   | Credits | Notes     |
|--------|------------------------------------|---------------|------------|------------|--------------|------------|--------------|------------|--------|---------|-----------|
| 1      | Outcome Credits Report             |               |            |            |              |            |              |            |        |         |           |
| 2      |                                    |               |            |            |              |            |              |            |        |         |           |
| 3      | Generated on: 08/29/2023 12:11 AM  |               |            |            |              |            |              |            |        |         |           |
| 4      | Generated by: LARRY HENDERSON (SS) |               |            |            |              |            |              |            |        |         |           |
| 5      | Parameters:                        |               |            |            |              |            |              |            |        |         |           |
| 6      | StartDate: 2022-08-29              |               |            |            |              |            |              |            |        |         |           |
| 7      | EndDate: 2023-06-30                |               |            |            |              |            |              |            |        |         |           |
| 8      | Office: SKILLSOURCE - WENATCHEE    |               |            |            |              |            |              |            |        |         |           |
| 9      |                                    |               |            |            |              |            |              |            |        |         |           |
| 10     | 141733                             | PEREZ-HERRERA |            | 2022-12-07 | 23           |            | 2017-11-20   | 12         | PROV   | 0       |           |
| 11     | 141733                             | PEREZ-HERRERA |            | 2022-12-07 | 23           |            | 2017-12-01   | 101        | BMARK  | 0       | Five Year |
| 12     | 150589                             | VERDUZCO      | 2022-11-13 | 2022-11-28 | 20           | 2023-06-26 | 2023-02-09   | 2          | CASR   | 0       | 220-223   |
| 13     | 150589                             | VERDUZCO      | 2022-11-13 | 2022-11-28 | 20           | 2023-06-26 | 2022-03-08   | 10         | EMPL   | 0       |           |
| 14     | 150589                             | VERDUZCO      | 2022-11-13 | 2022-11-28 | 20           | 2023-06-26 | 2023-05-05   | 45         | CREDIT | 0.25    | OCM100    |
| 15     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-10-26   | 55         | HSE    | 0       |           |
| 16     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-10-25   | 56         | HSEMTH | 1       | 152       |
| 17     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-10-04   | 57         | HSERLA | 1       | 166       |
| 18     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-09-28   | 58         | HSESCI | 1       | 170       |
| 19     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-09-21   | 59         | HSESOC | 1       | 164       |
| 20     | 150801                             | MILLER        | 2022-08-30 | 2022-08-30 | 16           | 2022-12-05 | 2022-09-21   | 59         | HSESOC | 1       | 164       |
| 21     | 151074                             | SPENCER       | 2022-08-29 | 2022-08-30 | 16           | 2023-04-11 | 2023-01-18   | 1          | CASM   | 0       | 247       |

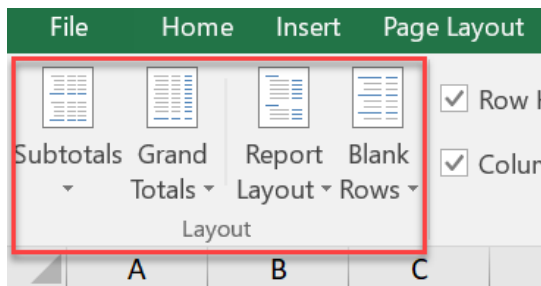
After deleting the description rows (marked in red above), then click the “Insert”



Click on Pivot Table and just accept the defaults until you get to this screen:



Select the “Design” tab.



Click Subtotals and select “**Do Not Show Subtotals**”.

Click Grand Totals and select “**Off For Rows and Columns**”.

Click Report Layout and select “**Show In Tabular Form**”.

Click Blank Rows and select “**Remove Blank Line After each Item**”.

Then select the fields you want included in the report.  
Make sure your first selection is the Last Name field.

The screenshot shows an Excel spreadsheet with a PivotTable and the PivotTable Fields task pane. The PivotTable is located in the range A3:G35 and has columns: Last Name, First Name, CMD ID, Outcome Date, Code, and Notes. The PivotTable Fields task pane is on the right, showing a list of fields with checkboxes. The fields 'Last Name', 'First Name', 'CMD ID', 'Outcome Date', 'Code', and 'Notes' are all checked. The 'Outcome Date' field is highlighted with a red box. The task pane also shows sections for FILTERS, COLUMNS, ROWS, and VALUES.

| Last Name        | First Name | CMD ID | Outcome Date | Code    | Notes      |
|------------------|------------|--------|--------------|---------|------------|
| ALCARAZ          | LESLIE     | 151768 | 2023-05-23   | BMARK   | ELA 2654 ( |
| AMAYA            | JACQUI     | 151609 | 2023-03-27   | CREDIT  | LFE100     |
|                  |            |        | 2023-04-10   | CREDIT  | LFE100     |
|                  |            |        | 2023-05-05   | CREDIT  | HEG100     |
|                  |            |        | 2023-05-23   | BMARK   | Five Year  |
|                  |            |        |              | CREDIT  | LFE200     |
|                  |            |        | 2023-05-25   | CREDIT  | LFE200     |
|                  |            |        | 2023-05-26   | CREDIT  | HEE100     |
|                  |            |        | 2023-05-27   | CREDIT  | LFE200     |
|                  |            |        | 2023-05-28   | CREDIT  | HEE100     |
| ARELLANO AREVALL | ANDREA     | 150767 | 2023-02-12   | HSESCI  | 155        |
| ASCENCIO         | ALEXANDER  | 151103 | 2023-01-18   | HSE     | (blank)    |
| ASHBROOK         | ELIZABETH  | 151289 | 2023-01-23   | HSERLA  | 159        |
|                  |            |        | 2023-01-30   | HSESOC  | 151        |
|                  |            |        | 2023-02-06   | HSESCI  | 160        |
|                  |            |        | 2023-02-09   | WKEYS   | (blank)    |
|                  |            |        | 2023-04-20   | WKLEARN | Comm Act   |
|                  |            |        | 2023-05-22   | CASM    | EFL gain   |
|                  |            |        | 2023-06-08   | BMARK   | Five Year  |
|                  |            |        | 2023-06-24   | HSEMTN  | 156        |
|                  |            |        | 2023-06-25   | HSE     | (blank)    |
| ASHFORD          | LEVI       | 148993 | 2022-11-22   | TRLEVEL | MHP008     |
|                  |            |        | 2023-01-25   | CASR    | 235        |
|                  |            |        | 2023-02-08   | WKGAIN  | 3-4        |
|                  |            |        | 2023-05-23   | HSERLA  | 145        |
|                  |            |        | 2023-05-30   | HSESOC  | 146        |
|                  |            |        | 2023-06-13   | HSESCI  | 154        |
|                  |            |        | 2023-07-26   | HSEMTN  | 152        |
| AUGER            | BENJAMIN   | 151198 | 2022-11-08   | PROV    | (blank)    |
|                  |            |        | 2023-01-05   | CREDIT  | HEG100     |
|                  |            |        | 2023-01-26   | CASM    | 221-236    |
|                  |            |        |              | CASM5   | 221-235    |

# Tips and Troubleshooting

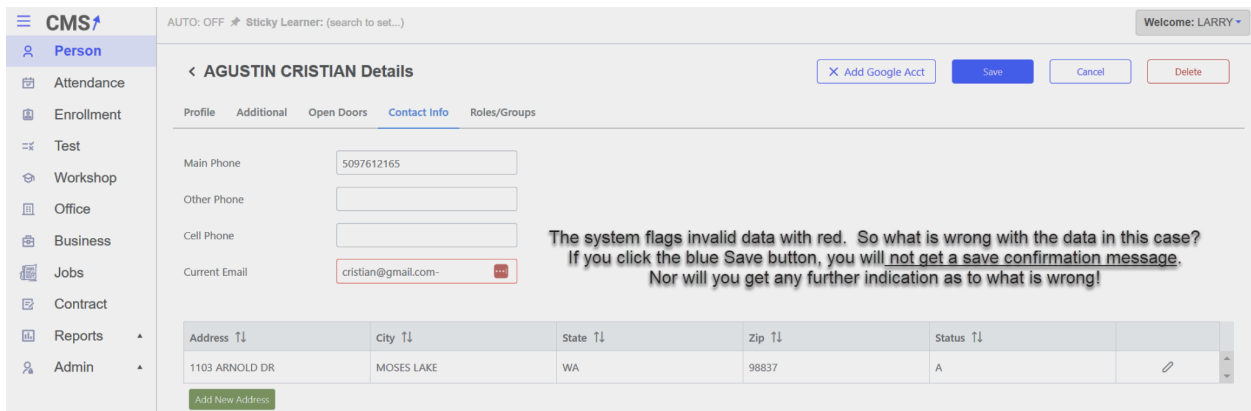
## 1. What if I click Save but do not see the confirmation message?



The screenshot shows the CMS Person list. A green success message box in the top right corner states: "Success Message: Data has been successfully updated." The table below shows a single entry for Agustin Cristian.

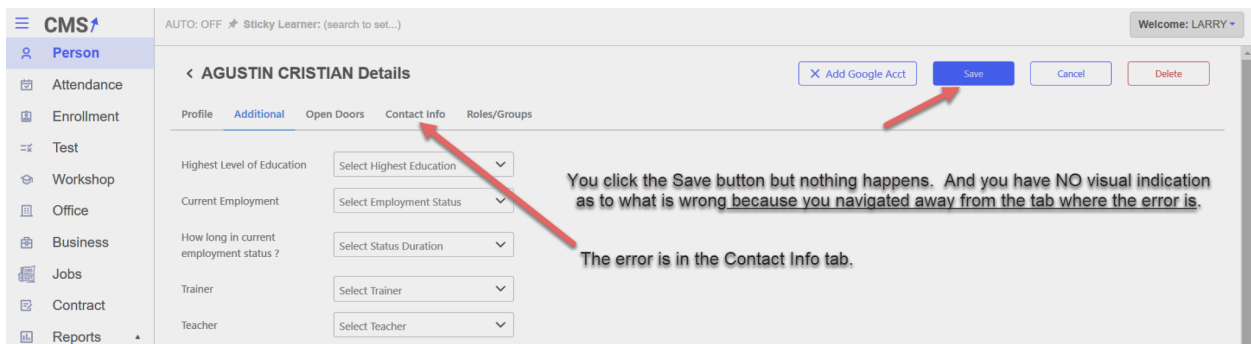
| CMS ID | Last Name | First Name | Birthdate  | Vet | Region | Status | Last Case Note |
|--------|-----------|------------|------------|-----|--------|--------|----------------|
| 151971 | CRISTIAN  | AGUSTIN    | 03-19-2007 | N   |        | A      |                |

This usually means that some field has invalid information. For example, consider an invalid email address:



The screenshot shows the CMS Person profile for Agustin Cristian. The "Contact Info" tab is selected. The "Current Email" field contains "cristian@gmail.com-" and is highlighted with a red border. A text overlay explains: "The system flags invalid data with red. So what is wrong with the data in this case? If you click the blue Save button, you will not get a save confirmation message. Nor will you get any further indication as to what is wrong!"

This visual indication of what is wrong is helpful **IF** you happen to be on the profile tab where the error has occurred. **But what if you are on some other tab in the person profile when you click the blue Save button?**



The screenshot shows the CMS Person profile for Agustin Cristian. The "Additional" tab is selected. The "Save" button is highlighted with a red arrow. A text overlay explains: "You click the Save button but nothing happens. And you have NO visual indication as to what is wrong because you navigated away from the tab where the error is. The error is in the Contact Info tab."

So your takeaway from this tip is this: If you click the blue Save button and you do not get the green save confirmation message in the upper right corner, **then click through all the profile tabs looking for red outlined fields of invalid or missing required information.** Correct the error and click Save again. You are not done until you see the green Save confirmation message.

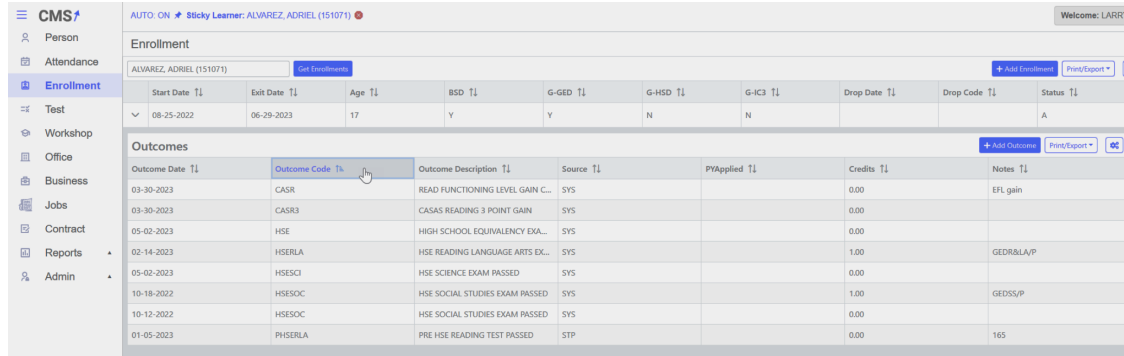


The screenshot shows the CMS Person list. A green success message box in the top right corner states: "Success Message: Data has been successfully updated." The table below shows a single entry for Agustin Cristian.

| CMS ID | Last Name | First Name | Birthdate  | Vet | Region | Status | Last Case Note |
|--------|-----------|------------|------------|-----|--------|--------|----------------|
| 151971 | CRISTIAN  | AGUSTIN    | 03-19-2007 | N   |        | A      |                |

## 2. How can I sort the data in the grid I am looking at?

You can sort almost all the data grids by clicking on a column header. I clicked on the Outcome Code column header and the records became sorted in ascending order by code. Click the header again to sort in the opposite order.

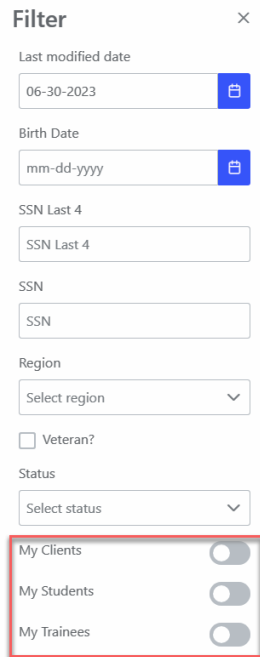


| Start Date | Exit Date  | Age | BSD | G-GED | G-HSD | G-4C3 | Drop Date | Drop Code | Status |
|------------|------------|-----|-----|-------|-------|-------|-----------|-----------|--------|
| 08-25-2022 | 06-29-2023 | 17  | Y   | Y     | N     | N     |           |           | A      |

| Outcome Date | Outcome Code | Outcome Description              | Source | PIApplied | Credits | Notes     |
|--------------|--------------|----------------------------------|--------|-----------|---------|-----------|
| 03-30-2023   | CASR         | READ FUNCTIONING LEVEL GAIN C... | SYS    |           | 0.00    | EFL gain  |
| 03-30-2023   | CASR3        | CASAS READING 3 POINT GAIN       | SYS    |           | 0.00    |           |
| 05-02-2023   | HSE          | HIGH SCHOOL EQUIVALENCY EXA...   | SYS    |           | 0.00    |           |
| 02-14-2023   | HSERLA       | HSE READING LANGUAGE ARTS EX...  | SYS    |           | 1.00    | GEDR&LA/P |
| 05-02-2023   | HSESCI       | HSE SCIENCE EXAM PASSED          | SYS    |           | 0.00    |           |
| 10-18-2022   | HSESOC       | HSE SOCIAL STUDIES EXAM PASSED   | SYS    |           | 1.00    | GEDSS/P   |
| 10-12-2022   | HSESOC       | HSE SOCIAL STUDIES EXAM PASSED   | SYS    |           | 0.00    |           |
| 01-05-2023   | PHSERLA      | PRE HSE READING TEST PASSED      | STP    |           | 0.00    | 165       |

## 3. What are My Clients, My Trainees and My Students?



Filter

Last modified date  
06-30-2023

Birth Date  
mm-dd-yyyy

SSN Last 4  
SSN Last 4

SSN  
SSN

Region  
Select region

☐ Veteran?

Status  
Select status

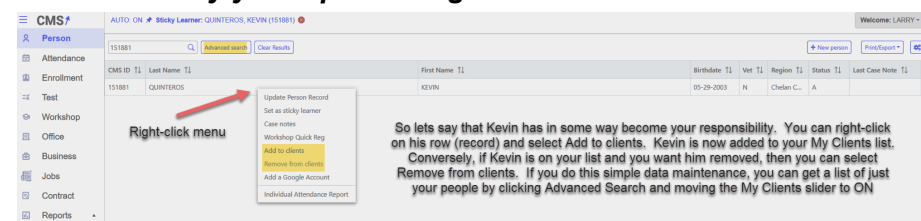
☒ My Clients

☐ My Students

☐ My Trainees

This is the data entry form that snaps to the right side of your screen when you click **Advanced Search**. The specific focus of this tip are the options with the red box around them. Your My Clients list is totally managed by you as I will show a little later. Your My Students list and My Trainees list are controlled by those people in your office who do most of the data entry work.

**My Clients:** As soon as someone becomes your responsibility you should add them to your My Clients list. ***Only you can do this because it is enabled by your specific login.***

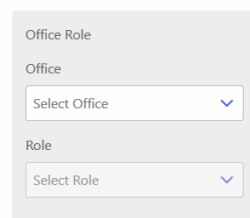


Right-click menu

Update Person Record  
Set as sticky learner  
Case notes  
Workshop Quick Reg  
Add to clients  
Remove from clients  
Add a Google Account  
Individual Attendance Report

So lets say that Kevin has in some way become your responsibility. You can right-click on his row (record) and select Add to clients. Kevin is now added to your My Clients list. Conversely, if Kevin is on your list and you want him removed, then you can select Remove from clients. If you do this simple data maintenance, you can get a list of just your people by clicking Advanced Search and moving the My Clients slider to ON

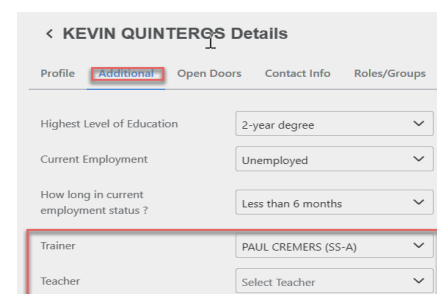
**My Students/My Trainees:** Your people appearing on these lists is controlled by the following data entry screen:



Office Role

Office  
Select Office

Role  
Select Role



< KEVIN QUINTEROS Details

Profile Additional Open Doors Contact Info Roles/Groups

Highest Level of Education  
2-year degree

Current Employment  
Unemployed

How long in current employment status ?  
Less than 6 months

Trainer  
PAUL CREMERS (SS-A)

Teacher  
Select Teacher

Assigning Trainer/Teacher:

If you are designated here as someone's Trainer then this will put the person on your **My Trainees** list. Likewise if you are a person's teacher then the person will show up on your **My Students** list.

#### 4. What does “Update Last Clock-in Dates” do and why is it important?

The screenshot shows the CMS Attendance page. A table of attendance records is displayed. A right-click context menu is open over the record for CMS ID 142589, with 'Update Last Clock-in-Dates' highlighted.

| CMS ID | Last Name        | First Name | Date | IF | IN      | OUT      | Teacher        | Contact Type | Purpose     | Groups           |
|--------|------------------|------------|------|----|---------|----------|----------------|--------------|-------------|------------------|
| 151874 | GONZALES INIGUEZ | JUDY       |      |    | 1:40 PM | 0        | MIRE DACEY     | Face to Face | Instruction | OPEND            |
| 151879 | JASPERS          | KATIE      |      |    | 1:24 PM | 0        | THERESA STRONG | Face to Face | Instruction | IC3              |
| 150547 | MANGSON          | KISARA     |      |    | 1:16 PM | 0        | DANA OSTERLUND | Face to Face | Instruction | SPED, OPEND, ALE |
| 142589 | BRAVO            | MARCOS     |      |    | 1:06 PM | 0        | THERESA STRONG | Face to Face | Instruction | IC3              |
| 131869 | HERNANDEZ        | ALEXANDER  |      |    | 1:04 PM | 0        | DANA OSTERLUND | Face to Face | Instruction | OPEND            |
| 142589 | BRAVO            | MARCOS     |      |    | 9:03 AM | 12:03 PM | THERESA STRONG | Face to Face | Instruction | IC3              |

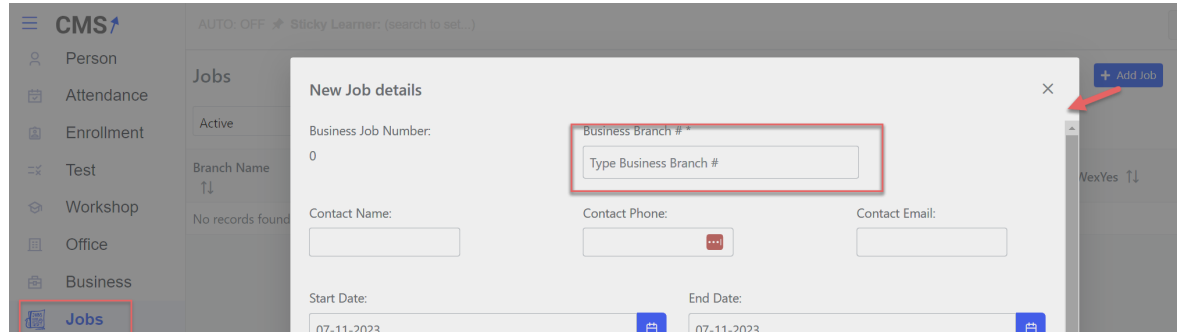
To get to this option you can right-click on ANY attendance record. This function is NOT learner specific and whenever you run it the “Last Clock-in Date” field for all learners is updated with their most recent attendance record. This is important because some reports, like the Roster Report, only include Students who have a clock-in date on or after their registration date. If a new student does not have an attendance record, then you must create one with just a few minutes of time. After you create this attendance record, you must run this option in order to get the student to show up on a Roster Report.

The screenshot shows the CMS Person page with the 'Additional' tab selected. The 'Last Clock In' field is highlighted with a red box, showing the date and time 07-20-2022 23:00:00.

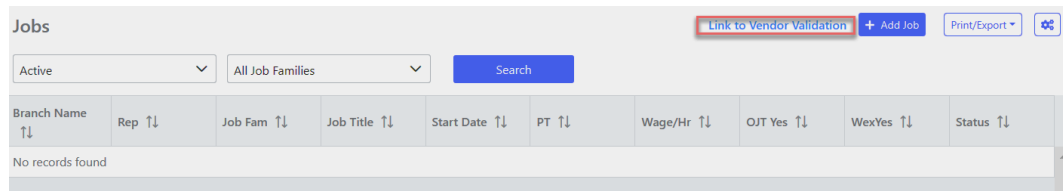
| Profile  | Additional | Open Doors | Contact Info | Roles/Groups |
|--|------------|------------|--------------|--------------|
| Highest Level of Education: Select Highest Education |            |            |              |              |
| Support Paid: 3452.58 Update Paid To Date            |            |            |              |              |
| Last Clock In: 07-20-2022 23:00:00                   |            |            |              |              |

## 5. How can I add a position opening if there is no business branch created yet?

- How do you know there is no business branch record? Go to the Jobs section and enter **any part** of the business name in the **Business Branch #** field.



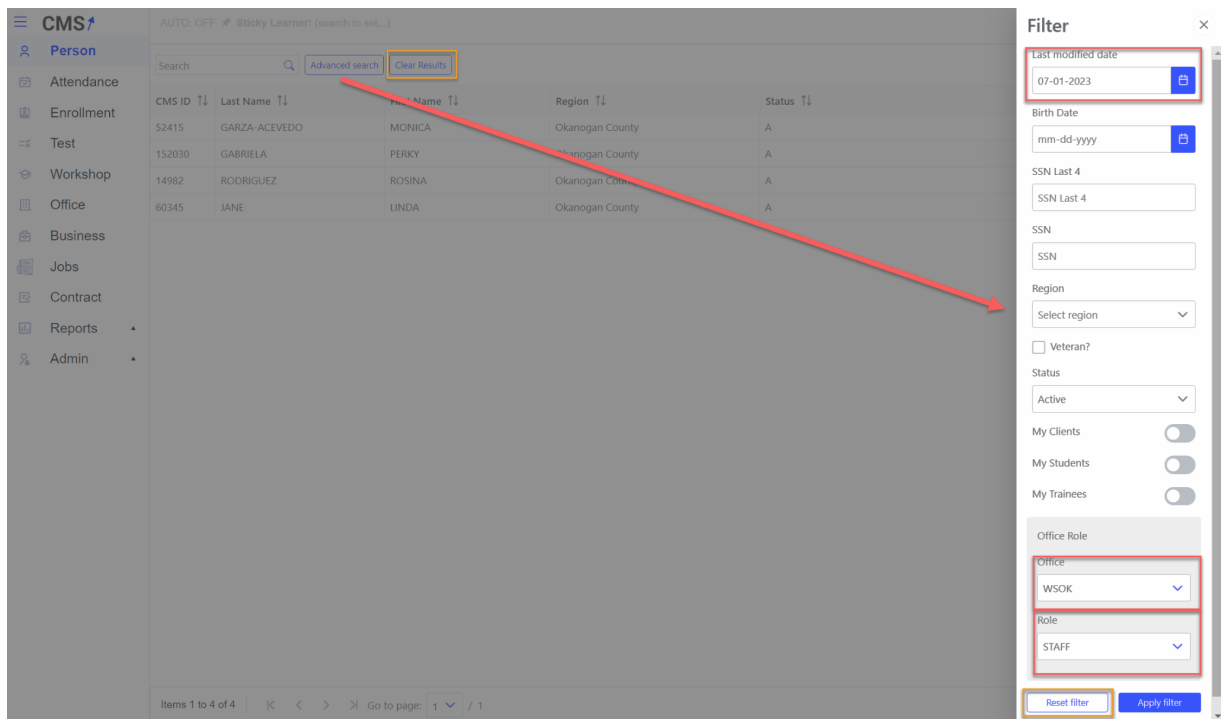
- As soon as you have verified there is no branch record then go directly to the Vendor Validation shared [google sheet](#) and enter the basic business information. (notice below the link to Vendor Validation directly in the Jobs tab). A business branch record is usually created within a few hours.



**(Note: Why this Vendor Validation step? This employer will probably never become involved in one of our training contracts. This is a good and legitimate question! Here is the answer: We are trying to build a clean and usable Employer/Business database that will enable us to serve them well. “Clean and usable” means that there is one and only one record for every business branch in our service area. Even if the business record is just for listing job openings, it is important to prevent duplicate records as much as possible. The Vendor Validation step helps the database administrator in this regard and it also gives Accounting an early heads up when the business is about to become a vendor. For more information see the section on [Why an Accurate De-Duplicated Business Database is Important](#))**

- Check the Vendor Validation sheet after a little while for the business branch # that has been assigned. Write down the branch# and then return to the Jobs tab and click **Add Job**. Enter the branch# in the field shown above and the rest of the information asked for on the form. When done click **Save** at the bottom of the form and your new Jobs record should appear in the list.
- If each trainer will promptly follow these steps, then the **Jobs** tab can become a quick and easy single source of truth about position openings.

## 6. Why would I need to use the Clear Results or Reset Filter buttons?



The screenshot shows the CMS interface with a search bar at the top. The search bar contains a search icon, a text input field, and two buttons: 'Advanced search' and 'Clear Results'. The 'Clear Results' button is highlighted with a yellow box. A red arrow points from this button to the 'Reset Filter' button in the filter sidebar, which is also highlighted with a yellow box. The filter sidebar is on the right side of the screen and contains various filters: 'Last modified date' (07-01-2023), 'Birth Date' (mm-dd-yyyy), 'SSN Last 4', 'SSN', 'Region' (Select region), 'Veteran?' (checkbox), 'Status' (Active), 'My Clients' (toggle), 'My Students' (toggle), 'My Trainees' (toggle), 'Office Role' (Office: WSOK, Role: STAFF), and 'Reset Filter' and 'Apply Filter' buttons. The table below the search bar shows 4 records for people in Okanogan County.

| CMS ID | Last Name     | First Name | Region          | Status |
|--------|---------------|------------|-----------------|--------|
| 52415  | GARZA-ACEVEDO | MONICA     | Okanogan County | A      |
| 152030 | GABRIELA      | PERKY      | Okanogan County | A      |
| 14982  | RODRIGUEZ     | ROSINA     | Okanogan County | A      |
| 60345  | JANE          | LINDA      | Okanogan County | A      |

The two buttons boxed in yellow do the same thing. They clear all the selection criteria used in the previous search operation. In the example above, we clicked Advanced Search and entered three selection criteria: **Last Modified Date** = 07-01-2023, **Office** = WSOK and **Role** = STAFF. I was wanting a list of all the Omak staff whose profile was modified in some way since July 1, 2023. When I clicked on the blue **Apply Filter** above, I got the list of 4 records you see above.

Now the *important thing to remember* is that all selection criteria remain in force until you specifically clear them out by clicking the Reset Filter or Clear Results button. If you try to do a new search back on the main screen for all the person records with the last name of “Stewart” **without** clearing the results of the previous search, your search would fail.

As a skill-building exercise, I encourage you to try your hand at some complex searches (i.e. searches with more than one criteria) of your own, one right after the other. For example, you could get a list of those in each office with Admin roles.



## 7. How can I find out how much we have paid a participant by funding code?

Find the person and open the Profile information tabs. We will use cmsID 151055 as an example:

The screenshot shows the CMS interface. On the left is a sidebar with a hamburger menu icon and the text 'CMS' with an upward arrow. Below this are icons and labels for 'Person', 'Attendance', 'Enrollment', and 'Test'. The 'Person' tab is selected. The main area at the top shows 'AUTO: ON' and 'Sticky Learner: MONRROY, BRIANNA (151055)' with a red close icon. Below this is a search bar containing '151055' and buttons for 'Advanced search' and 'Clear Results'. A table below the search bar has three columns: 'CMS ID ↑↓', 'Last Name ↑↓', and 'First Name ↑↓'. The table contains one row with the values '151055', 'MONRROY', and 'BRIANNA'.

| CMS ID ↑↓ | Last Name ↑↓ | First Name ↑↓ |
|-----------|--------------|---------------|
| 151055    | MONRROY      | BRIANNA       |

Double click the row to get access to the Profile information tabs:

The screenshot shows the 'BRIANNA MONRROY Details' page. The left sidebar is the same as in the previous screenshot. The main area has a title '< BRIANNA MONRROY Details' and a tabbed interface with 'Profile', 'Additional', 'Open Doors', 'Contact Info', and 'Roles/Groups'. The 'Additional' tab is selected and highlighted with a red box. Below the tabs, it shows 'CMS ID: 151055' and 'Person ID: MOBR0924F'.

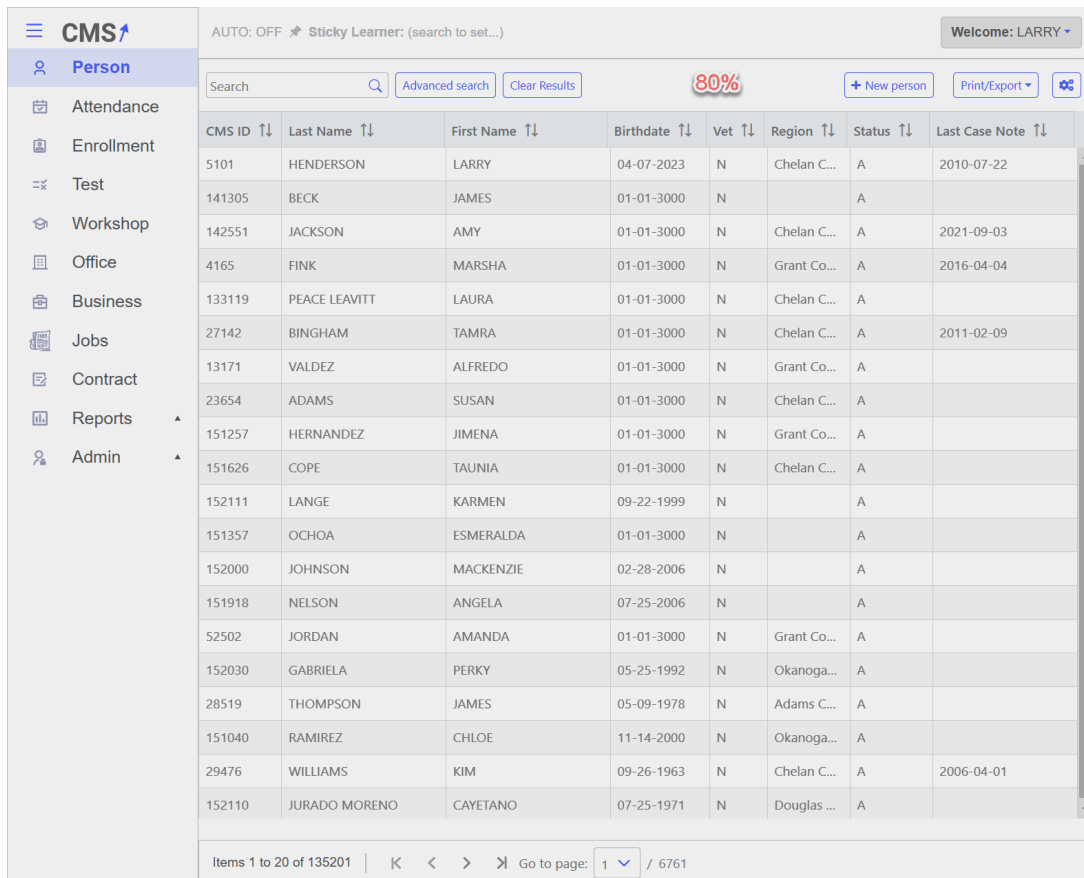
Select the Additional tab and scroll down to the bottom of the form and you will find a link that says **Update Paid To Date**. This will show a small circular wait icon, and if there are payment records it will show a non-zero number as seen in the screenshot below.

The screenshot shows the 'Additional' tab of the participant's details. It displays 'Hrs possible' with an empty input field. Below that, 'Support Paid:' is followed by the number '6967.66' and a blue link 'Update Paid To Date'. The entire row is highlighted with a red box. At the bottom, 'Last Clock In:' is followed by an empty input field.

Finally, click the actual number (in this case 6967.66) to generate a printable report by GLCode.

## 8. How do I zoom in so that the words on the screen are larger?

This can be easily accomplished using the **Ctrl** key with the **+** and **-** keys. *It is optimal to set the zoom to 80% because this will show all 20 records of the current page.* If you set the zoom to 90% you will have to use the vertical scroll bar on the right to see the last few records on the page.



The screenshot shows the CMS interface with a sidebar on the left containing menu items: Attendance, Enrollment, Test, Workshop, Office, Business, Jobs, Contract, Reports, and Admin. The main content area displays a table of persons. The table has columns: CMS ID, Last Name, First Name, Birthdate, Vet, Region, Status, and Last Case Note. The table is currently displaying 20 records. The zoom level is indicated as 80% in the top right corner. The bottom of the interface shows pagination information: Items 1 to 20 of 135201, and a 'Go to page' dropdown set to 1 / 6761.

| CMS ID | Last Name     | First Name | Birthdate  | Vet | Region      | Status | Last Case Note |
|--------|---------------|------------|------------|-----|-------------|--------|----------------|
| 5101   | HENDERSON     | LARRY      | 04-07-2023 | N   | Chelan C... | A      | 2010-07-22     |
| 141305 | BECK          | JAMES      | 01-01-3000 | N   |             | A      |                |
| 142551 | JACKSON       | AMY        | 01-01-3000 | N   | Chelan C... | A      | 2021-09-03     |
| 4165   | FINK          | MARSHA     | 01-01-3000 | N   | Grant Co... | A      | 2016-04-04     |
| 133119 | PEACE LEAVITT | LAURA      | 01-01-3000 | N   | Chelan C... | A      |                |
| 27142  | BINGHAM       | TAMRA      | 01-01-3000 | N   | Chelan C... | A      | 2011-02-09     |
| 13171  | VALDEZ        | ALFREDO    | 01-01-3000 | N   | Grant Co... | A      |                |
| 23654  | ADAMS         | SUSAN      | 01-01-3000 | N   | Chelan C... | A      |                |
| 151257 | HERNANDEZ     | JIMENA     | 01-01-3000 | N   | Grant Co... | A      |                |
| 151626 | COPE          | TAUNIA     | 01-01-3000 | N   | Chelan C... | A      |                |
| 152111 | LANGE         | KARMEN     | 09-22-1999 | N   |             | A      |                |
| 151357 | OCHOA         | ESMERALDA  | 01-01-3000 | N   |             | A      |                |
| 152000 | JOHNSON       | MACKENZIE  | 02-28-2006 | N   |             | A      |                |
| 151918 | NELSON        | ANGELA     | 07-25-2006 | N   |             | A      |                |
| 52502  | JORDAN        | AMANDA     | 01-01-3000 | N   | Grant Co... | A      |                |
| 152030 | GABRIELA      | PERKY      | 05-25-1992 | N   | Okanoga...  | A      |                |
| 28519  | THOMPSON      | JAMES      | 05-09-1978 | N   | Adams C...  | A      |                |
| 151040 | RAMIREZ       | CHLOE      | 11-14-2000 | N   | Okanoga...  | A      |                |
| 29476  | WILLIAMS      | KIM        | 09-26-1963 | N   | Chelan C... | A      | 2006-04-01     |
| 152110 | JURADO MORENO | CAYETANO   | 07-25-1971 | N   | Douglas ... | A      |                |

I recommend that you play around with this functionality so that when you need it you will remember to use it. But if you do zoom in, make sure you zoom out to 80% for your regular use.

## 9. How can I maximize the time CMS remains open and ready for use?

If you are actively using CMS, i.e. navigating the main sections, making selections with mouse clicks, or ***even just moving the mouse***, etc., the 15 minute automatic logout timer will keep resetting. Another thing that triggers an automatic logout is the closing of the browser session that is running CMS. You will always have to login again if you close the browser. So keep the browser tab that is running CMS open all the time. If you need to do something else, make it a habit to frequently return to CMS and just move the mouse ever so slightly. This should minimize the number of times you have to login during the day. Another strategy is to wait until you have a number of CMS tasks to do before you login. I appreciate your patience with this behavior. It is a very necessary security feature, given the amount of protected personal information in CMS.

## 10. How can I get a list of My Clients sorted by Last Casenote Date?

The screenshot shows the CMS interface with a list of clients. The filter panel on the right is open, and the "My Clients" filter is selected. A red arrow points to the "My Clients" filter, indicating that it should be applied. The list of clients is sorted by "Last Casenote Date".

| CMS ID | Last Name          | First Name          | Birthdate  | Vet | Region   |
|--------|--------------------|---------------------|------------|-----|----------|
| 151312 | CHAVEZ             | EMMA                | 11-19-2004 | N   | Chelan C |
| 151172 | ROLDAN PINA        | SARAI               | 02-08-2006 | N   | Chelan C |
| 151431 | TORRES LUCATERO    | GUADALUPE (LUPITA)  | 05-10-2006 | N   | Chelan C |
| 149481 | VARGAS OLIVARES    | ISRAEL              | 10-20-2004 | N   | Chelan C |
| 151439 | RAMIREZ            | EVELYN              | 07-10-2006 | N   | Chelan C |
| 150425 | EMERSON            | NAOMI               | 04-27-2006 | N   | Chelan C |
| 150896 | GUTIERREZ MANJARES | FERNANDO            | 01-17-2005 | N   | Chelan C |
| 150815 | HARDIN             | MAGDALENE (MANGO)   | 07-22-2006 | N   | Chelan C |
| 150836 | GREGORY            | RONALD (RONNIE)     | 08-01-2004 | N   | Chelan C |
| 151134 | BLACK              | JEWELIANA (JULIE)   | 10-19-2006 | N   | Douglas  |
| 151334 | SILVA VARGAS       | ALEXANDER           | 05-20-2006 | N   | Chelan C |
| 151203 | MARAVILLA MILLER   | XAVIER              | 03-15-2006 | N   | Douglas  |
| 151214 | MORALES            | MARSELA             | 11-04-2006 | N   | Chelan C |
| 151168 | CHANCEY            | CHRISTOPHER (CHRIS) | 11-22-2006 | N   | Douglas  |
| 150600 | FLORES             | HEINLEY             | 05-24-2006 | N   | Chelan C |
| 150664 | ALDACO             | DOMINIC             | 01-12-2006 | N   | Chelan C |
| 149838 | ZHUPIKOV           | STACY               | 07-22-2004 | N   | Douglas  |
| 150319 | LEWIS              | ALEXANDER (ALEX)    | 05-02-2004 | N   | Douglas  |

After applying the "My Clients" filter the list is constrained to just Dana's clients. Notice the ordering of the "Last Casenote" column:

CMS

Person

Attendance

Enrollment

Test

Workshop

AUTO: OFF Sticky Learner: (search to set...)

Welcome: DANA

Search

Advanced search

Clear Results

+ New person

Print/Export

| CMS ID | Last Name | First Name | Birthdate  | Vet | Region      | Status | Last Case Note |
|--------|-----------|------------|------------|-----|-------------|--------|----------------|
| 141808 | WILSON    | BRANDON    | 03-08-2000 | N   | Chelan C... | A      | 2017-12-01     |
| 139778 | VARELA    | JOVAN      | 02-05-2000 | N   | Chelan C... | A      | 2018-03-02     |
| 141976 | GOLDY     | TANNER     | 07-22-1999 | N   | Chelan C... | A      | 2018-06-08     |

Click on the “Last Case Note” column **header**. The sorting will be reversed:

## 11. What do I do if I get a “Something Went Wrong” error?

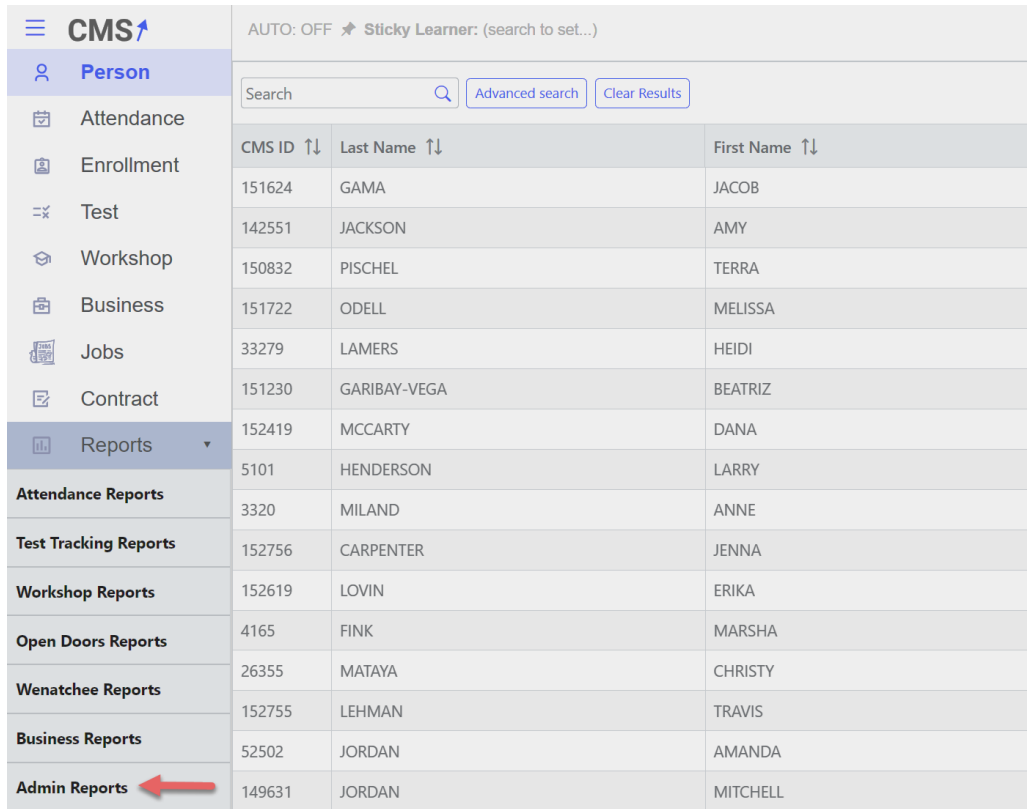
The answer for this issue depends somewhat on where you are and what you are doing. For this tip, I am going to assume, as an example, that we are creating a new Person record. This is an activity where many things are going on in the background when you attempt to save a new Person record. If you click and do not get a Save Confirmation message, check first all of the fields in all of the person profile forms and look for a field with a faint red outline around it.

|            |   |  |  |  |  |  |  |                |  |  |  |  |  |
|------------|---|--|--|--|--|--|--|----------------|--|--|--|--|--|
| CMS        |   | AUTO: OFF Sticky Learner: (search to set...) |  |  |  |  |  | Welcome: LARRY |  |  |  |  |  |
| Person     | <input type="button" value="Add Google Acct"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/>                      |  |  |  |  |  |  |                |  |  |  |  |  |
| Attendance | < New Person Details <input type="button" value="Add Google Acct"/> <input type="button" value="Save"/> <input type="button" value="Cancel"/> |  |  |  |  |  |  |                |  |  |  |  |  |
| Enrollment | Profile Additional Open Doors <b>Contact Info</b> Roles/Groups  |  |  |  |  |  |  |                |  |  |  |  |  |
| Test       | Main Phone <input type="text"/>   |  |  |  |  |  |  |                |  |  |  |  |  |
| Workshop   | Other Phone <input type="text"/>  |  |  |  |  |  |  |                |  |  |  |  |  |
| Office     | Cell Phone <input type="text"/>   |  |  |  |  |  |  |                |  |  |  |  |  |
| Business   | Current Email <input type="text" value="micky.gmail.com"/>  |  |  |  |  |  |  |                |  |  |  |  |  |
| Jobs       | Address City State Zip Status   |  |  |  |  |  |  |                |  |  |  |  |  |
| Contract   | No records found  |  |  |  |  |  |  |                |  |  |  |  |  |
| Reports    | <input type="button" value="Add New Address"/>  |  |  |  |  |  |  |                |  |  |  |  |  |
| Admin      |   |  |  |  |  |  |  |                |  |  |  |  |  |

Notice the faint red outline around the field box. I typed in mickey.gmail.com which is not a valid email address. The second “.” should have the required “@” symbol. These kinds of errors will cause the save process to fail but **WITHOUT** an error message. I am trying to get the programmers to change that and

provide the user with a specific and helpful error message. If you get a “Save confirmation” message **AND** an additional message saying “**Something went wrong**” it is important that you **NOT** try and enter the person's record again. The record creation process was successful but another operation failed generating the “**Something went wrong**” message. Please report these to the Database Administrator as soon as you get a chance.

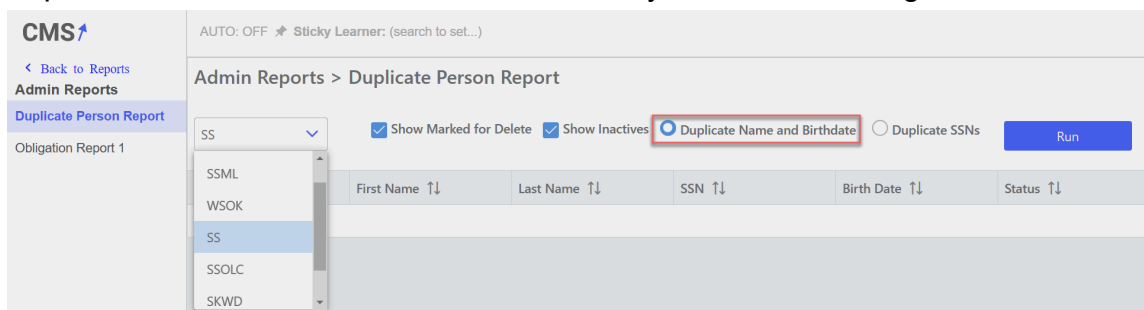
## 12. How do I check for duplicate records and delete them?



The screenshot shows the CMS interface with the 'Person' menu selected. The 'Reports' dropdown is open, and the 'Admin Reports' option is highlighted with a red arrow. The table below shows the data for the 'Admin Reports' section.

| CMS ID ↑↓ | Last Name ↑↓ | First Name ↑↓ |
|-----------|--------------|---------------|
| 151624    | GAMA         | JACOB         |
| 142551    | JACKSON      | AMY           |
| 150832    | PISCHEL      | TERRA         |
| 151722    | ODELL        | MELISSA       |
| 33279     | LAMERS       | HEIDI         |
| 151230    | GARIBAY-VEGA | BEATRIZ       |
| 152419    | MCCARTY      | DANA          |
| 5101      | HENDERSON    | LARRY         |
| 3320      | MILAND       | ANNE          |
| 152756    | CARPENTER    | JENNA         |
| 152619    | LOVIN        | ERIKA         |
| 4165      | FINK         | MARSHA        |
| 26355     | MATAYA       | CHRISTY       |
| 152755    | LEHMAN       | TRAVIS        |
| 52502     | JORDAN       | AMANDA        |
| 149631    | JORDAN       | MITCHELL      |

For all those who create new Person records, it is recommended that you run the Duplicate Persons Report at least once a week. You get to it via the Admin Report menu as shown above. This will take you to the following screen:



The screenshot shows the 'Admin Reports > Duplicate Person Report' screen. The 'Duplicate Name and Birthdate' option is selected, and the 'Run' button is visible. The table below shows the data for the 'Duplicate Person Report' section.

| First Name ↑↓ | Last Name ↑↓ | SSN ↑↓ | Birth Date ↑↓ | Status ↑↓ |
|---------------|--------------|--------|---------------|-----------|
|               |              |        |               |           |

Be sure to select your office and then click Run. If duplicate records are found they will be displayed. **Note:** It is possible for two records to have the same name and birthdate and really be different people! Usually we want to remove the newest record, i.e. the one with the highest cmsID number. Right click on the

record you want to remove and select the desired option. Pick the option that says "Move casenotes and workshops and fully delete."

### 13. When reporting issues, use clear and accurate terminology.

Use clear and accurate terminology when communicating about CMS. The term "soft enroll" should be replaced by the more accurate **"partial participant record"**. There is no enrollment of any kind going on when you create a partial participant record. You create a "partial" so you can **"register"** them in a workshop. This partial record is enough to give you a **"cmsID"**, but this is not an enrollment of any kind. I do not know where the term "soft enroll" came from but I am strongly encouraging you to stop using it.

The system does not allow you to delete a participant record after it is created. But it is possible to "flag the record for deletion" by clicking the "Deleted" radio button at the bottom of the profile tab.

The screenshot shows the CMS interface for a person's profile. The left sidebar lists various tabs: Person, Attendance, Enrollment, Test, Workshop, Office, Business, Jobs, Contract, Reports, and Admin. The main content area is titled 'CMS' and shows the profile for 'GONZALEZ, ROBERTO (152899)'. The 'Profile' tab is selected, and the 'Status' section at the bottom shows 'Active' selected, with 'Inactive' and 'Deleted' options available. Red boxes highlight the 'Profile' tab and the 'Status' section.

| Field              | Value  |
|--------------------|--|
| First Name *       | ROBERTO  |
| Last Name *        | GONZALEZ   |
| Birth Date *       | 12-29-2006   |
| Gender *           | <input checked="" type="radio"/> Male <input type="radio"/> Female <input type="radio"/> Unknown     |
| WIOA Status        | Select WIOA Status   |
| County             | Chelan County  |
| Veteran?           | <input type="checkbox"/>   |
| Race               | Select Race  |
| Hispanic or Latino | <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Unknown                     |
| User name          | 152899   |
| Password           |  |
| Confirm Password   |  |
| Status             | <input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Deleted |

If you select the Inactive or Deleted radio buttons and save the record, **you will not be able to pull up the record again in the usual way**. This makes it

appear like the record has been deleted. If this happens you can always select "Advanced Search" and select the "Status" you want to search by. If you suspect that you selected the "Deleted" option you can still find it by status equal to "Deleted". Change the status back to "Active" and all should work as normal.

#### 14. What is the process for requesting new functionality?

Write up your request and send it to the Database Administrator (identified at the beginning of this document). Include a detailed description of the need and how your proposed solution addresses the need.

#### 15. How To Create an IWT (Incumbent Worker Training) contract?

Start the new contract wizard by entering the number **1** for the cmsID# and just follow the wizard from there.

After entering the number "1" for CMS# click the blue button called "Load Participant Record". Notice that the Full Name field shows:

**"IWT PARTICIPANTS"** (IWT's frequently involve more than one participant).

Select the Office from the dropdown. Then enter the Start Date and the Fund Code (either CR or LD). In the Business Branch # field **you can enter any part of the business name and select from a list** if you do not know what the Business Branch # is. If the Business Branch does not exist, go to the Vendor Validation shared Google sheet and enter the basic business data. Several accounting staff monitor this spreadsheet daily and your business branch should be created within hours.

Clicking “Next” will bring up the final page of the IWT contract wizard:

The screenshot shows a web form titled "New IWT contract" with a close button (X) in the top right corner. The form is divided into two main sections: "Contract Details" and "Business information".


**Contract Details**

- Contract ID:** A text input field, currently blank, highlighted with a red box.
- Status:** A dropdown menu with "Active" selected.
- Office:** A dropdown menu with "SKILLSOURCE - WENATCHEE" selected.
- Activity Code:** A dropdown menu with "IWT" selected.
- Fund Code:** A dropdown menu with "CR" selected.
- Trainer:** A dropdown menu with "CHRISTIAN RAMIREZ (SS-A)" selected. The word "Trainer" is highlighted with a red box.
- Total Obligation Amount:** A text input field with "4000.00" entered, highlighted with a red box.
- Start Date:** A text input field with "01-28-2025" entered, highlighted with a red box.
- End Date:** A text input field with a placeholder "mm-dd-yyyy", highlighted with a red box.

**Business information**

- Business Branch #:** A text input field with "2" entered.
- Branch Name:** "SAFEWAY - GRANT ROAD"
- Address:** "EAST WENTACHEE WA 98802-8563"
- Phone:** "5098840707"
- Email:** "--"
- Signer Name:** A text input field, currently blank, highlighted with a red box.
- Status:** "A"

At the bottom of the form, there is a checkbox labeled "Is Contract Modification?". To its right, the text "Total Contract Obligation \$ 4000.00" and "Total Paid to Date \$ 0.00" is displayed. Below this, there are three buttons: "Print Contract", "Save", and "Cancel".

The **Contract ID** is blank because the contract is not saved yet. On this screen you will need to select the **Trainer**, enter the **Total Obligation Amount** and the **Start Date** and **End Date**. The Business **Signer Name** is a required field because it transfers to the printed contract. Click **Save** when that data is entered and the **Print Contract** button will be enabled. When the Contract is displayed do not click **Print** if you want it saved as a PDF. Rather select the **Download** option  and navigate to where you want it saved as a PDF. Use your chosen naming convention and file storage location, i.e. where your previously created Application was stored.



## 16. How do I set the office signer for OJT contracts?

The system looks for the office staff person with an **Active Officesign role**. There is only supposed to be one person with an active Officesign role for each office. You can do an Advanced Search for the person with this role in your office. It is a common problem that when office management personnel changes, this CMS task is forgotten.

The screenshot shows the 'LISA BAUER Details' page in the CMS. The 'Roles/Groups' tab is selected. A table lists roles for 'WORKSOURCE - OKANOGAN'. The role 'OFFICESIGN' is highlighted with a red box.

| Office T↓             | Role T↓      | Status T↓ | PRID T↓ | Last updated T↓ |  |
|-----------------------|--------------|-----------|---------|-----------------|--|
| WORKSOURCE - OKANOGAN | TRAINER      | A         | 197493  | 04-16-2024      |  |
| WORKSOURCE - OKANOGAN | STAFF        | A         | 197498  | 04-16-2024      |  |
| WORKSOURCE - OKANOGAN | WKS-SCHEDULR | A         | 198072  | 07-24-2024      |  |
| WORKSOURCE - OKANOGAN | OFFICESIGN   | A         | 198686  | 10-04-2024      |  |

## 17. What is the quickest way to get to Vendor Validation from anywhere in CMS?

The screenshot shows the 'Jobs' page in the CMS. The 'Jobs' tab is selected. A button labeled 'Link to Vendor Validation' is highlighted with a red box.

Click on **Jobs** then **Link to Vendor Validation**.

## 18. How do you set up an Open Doors student?

- Make sure the person has an active **Learner role**
- Make sure the person has an active **OPEND group** assignment.
- Make sure the person has an active school district **Program** assignment.
- In the Additional Information tab make sure the correct **Teacher** is assigned AND that they have a **Register Date** on or near the beginning of the current school year.
- Make sure that they have an **active Enrollment record** that has the correct **group** (OPEND) and district **Program** code.
- Make sure they show up on the Roster that is generated for the Teacher, the Group and the Program. NOTE: They will NOT show up on the Roster unless they have a least one attendance record on or after their Register Date.
- Make sure they know how to clock in and out of the Attendance station.

## 19. How do you update a person's email address and/or phone?

The screenshot shows the 'LARRY HENDERSON Details' page in the CMS. The 'Contact Info' tab is selected and highlighted with a red box and an arrow. The 'Main Phone' field is highlighted with a red box and contains '509-860-0864'. The 'Current Email' field is highlighted with a red box and contains 'larry@skillsource.org'. The 'Address' section shows two entries: '130 NORTH EMERSON AVE, WENATCHEE, WA, 98801' and '916 HOWARD STREET, WENATCHEE, WA, 98801'.

These two pieces of information are critically important for the following reasons:

- Communication
- CRM's like LaunchPad use the uniqueness of email addresses to help prevent duplicate records. The same is true of birthdates. All users of CMS need to take meticulous care that these important pieces of information are present and correct.

## 20. How do you create a multi-day workshop where each day is the same? (Same start/end time, room and instructor)

Click New Workshop

The screenshot shows the 'New Workshop' page in the CMS. The 'New Workshop' button is highlighted with a red box. The 'Start Date' is set to '12-10-2024' and the 'End Date' is set to '12-10-2024'. The 'Load Workshops' button is also visible.

You will be presented with a wizard for creating a new workshop: See next page.

**New workshop** ✕

**Event Information** | Event Days | Workshop Information

Workshop #:  
Event Type: WORKSHOP

Course: ACT-ACT Youth Workshop ▼

Short Title: ACT

Status:  
☒ Active 
 ☐ Tentative 
 ☐ Cancelled

Delivery Method?:  
☒ In person 
 ☐ Virtual 
 ☐ Both

Office: SKILLSOURCE - WENATCHEE ▼

Contact: LARRY HENDERSON ▼

☒ Public Event? [Check Event Calendar](#)

Qualifying Workshop? No

**Save** **Cancel**

Note the three tabs at the top: **Event Information**, **Event Days** and **Workshop Information**. Do not click **Save** until after you have completed at least the **Event Days** tab. Select the course and what other options apply to the workshop you are creating.

Click the middle tab: **Event Days** next. This will bring up the following screen:

**New workshop** ✕

Event Information | **Event Days** | Workshop Information

< December 2024 >

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1  | 2  | 3  | 4  |

Start Time: 12:00 AM 📅

End Time: 03:54 PM 📅

Description:

Note:

Office: SKILLSOURCE - WE... ▼

Room: Select Room ▼

Instructor: Select Instructor ▼

**Set all**

Selected Dates:

**Save** **Cancel**

Navigate to the Month in which the first day of the workshop occurs. Let's say that is December 2024. Select the days of the workshop using your mouse. If a date is not selectable, it means that there is a conflict with that date. Notice what happens when you select a date: the selected day is highlighted with a blue circle AND the date is listed below in the **Selected Dates** area.

**New workshop** [X]

Event Information **Event Days** Workshop Information

< December 2024 >

| Su | Mo | Tu | We | Th | Fr | Sa |
|----|----|----|----|----|----|----|
| 1  | 2  | 3  | 4  | 5  | 6  | 7  |
| 8  | 9  | 10 | 11 | 12 | 13 | 14 |
| 15 | 16 | 17 | 18 | 19 | 20 | 21 |
| 22 | 23 | 24 | 25 | 26 | 27 | 28 |
| 29 | 30 | 31 | 1  | 2  | 3  | 4  |

Start Time: 08:30 AM [Calendar Icon]

End Time: 12:30 PM [Calendar Icon]

Description: [Text Field]

Note: [Text Field]

Office: SKILLSOURCE - WE... [Dropdown]

Room: CU170 [Dropdown]

Instructor: STAFF MEMBER [Dropdown]

[Set all]

Selected Dates:

2024-12-17 [X] 2024-12-18 [X] 2024-12-19 [X]

[Save] [Cancel]

After selecting the last date, set the **Start Time**, **End Time**, **Room** and **Instructor**, click the **Set All** button. This will make sure all the dates are set to the same selections. When you are finished with all the selections, click **Save**. Corresponding Google Calendar events will be created automatically in the background.

**Note:** Notice the **Selected Dates** section in the bottom left corner of the screen above. You can delete a day by clicking the little circled x if needed. **After** creating and saving a new workshop you can click on the rectangular button showing the date and edit the settings (Start/End Times, Room or Instructor) for **that day only**. If you make a change like this, make sure you do **not** click the **Set All** button, because this will change all the days of the workshop to those settings.

## 21. How do I look up a Person record in CMS?

Scenario: You have a person in front of you or on the phone and you want to see if they have a record in CMS.

**IF we could be certain that every person had a correct birth date**, then we could insist that all lookups be done using the birth date. This lookup would almost always give you a list of 1 to 10 records from which you could just pick the matching name. (This is how hospitals and pharmacies do it.) If the name did not appear in the list then you could be quite certain that the person was not in the database. But because we know that not every record has a correct birth date, we usually do a lookup by name.

But **NEVER** be satisfied with a lookup by name only without verifying that the record you find **IS** the same person as the one in front of you. Also know that it is quite common to do a lookup by name and NOT find any records! This is usually due to slight variations in spelling. We recommend starting with the last name and then a comma “,” and then a space and then the first letter of the first name. Follow these steps to verify:

1. Is the **birthdate** the same? This is why it is very important to enter correct birth dates in CMS Person records. **Never create a CMS record with an incorrect birth date and never enter the current date in the birth date field. If you do not know the birth date then enter the official temporary placeholder birth date of ‘01-01-1900’.** Keep in mind that it is possible, although rare, for two person records to have the same name AND birth date and still be two different people.
2. Is the **address** the same? An address is even more likely to be missing or not current. CMS stores all the addresses a person has over time. Only one address can be active at any given time. **Every staff person who creates new records in CMS must know how to check a person’s active address.**
3. Is the **SSN** the same? Since this is an optional field, it is frequently skipped at initial data entry. If you encounter a record with a missing SSN and you have that information in your paperwork, please take the time to enter the information and save the record.
4. Is the **email address** the same? This is also an optional field, but if you have it at data entry time it is always best to enter it.

**KEY TAKEAWAY:** The more information you enter about a person during initial entry, the easier it will be later to verify identity and avoid duplication.

# Technologies Used

## Benefits of each technology:

1. **Laravel** (PHP framework): Laravel is a powerful and popular PHP framework that provides a clean and elegant syntax, along with a wide range of built-in features and tools. It offers robust security, efficient routing, easy database management, and supports MVC (Model-View-Controller) architecture, making development faster and more organized.
2. **PHP**: PHP is a widely used server-side scripting language for web development. It has a large community, extensive documentation, and offers excellent compatibility with various platforms and frameworks. PHP integrates seamlessly with databases and provides strong support for web development tasks.
3. **MariaDB** (Relational Database Management System): MariaDB is a popular open-source relational database management system. It is a fork of MySQL and offers high performance, scalability, and security. MariaDB is fully compatible with PHP and provides seamless integration with Laravel, making it an excellent choice for storing and retrieving data in web applications.
4. **REST API** (Representational State Transfer): REST API is a standardized architectural style for building web services. It allows different applications to communicate with each other over HTTP, following a set of rules and conventions. REST APIs are scalable, stateless, and platform-independent, making them ideal for building modern web applications and enabling efficient data exchange between the front-end and back-end.
5. **React/JS** (JavaScript library): React is a widely used JavaScript library for building user interfaces. It offers a component-based architecture, which allows for reusable and modular UI development. React provides efficient rendering, virtual DOM manipulation, and a rich ecosystem of libraries and tools. It seamlessly integrates with Laravel and REST APIs, enabling dynamic and interactive front-end development.
6. **HTML5**: HTML5 is the latest version of the Hypertext Markup Language used for structuring and presenting content on the web. It provides a wide range of new features and APIs that enhance the development of modern web applications. HTML5 supports multimedia elements, canvas for drawing graphics, geolocation, local storage, and more. It works seamlessly with React/JS and REST APIs to create engaging user interfaces and interactive web experiences.

Together, these technologies provide a robust and efficient stack for web development. Laravel and PHP handle server-side logic, MariaDB manages the database, REST APIs facilitate communication between the front-end and back-end, and React/JS with HTML5 create dynamic and responsive user interfaces. This combination offers a powerful foundation for building scalable, secure, and feature-rich web applications.

## Hosted on AWS (Amazon Web Services):

1. **Scalability:** AWS provides scalable infrastructure services that allow you to easily handle varying levels of traffic and user demand. You can use services like Amazon EC2 (Elastic Compute Cloud) to scale your PHP and Laravel applications horizontally or vertically based on your needs. This ensures that your application remains responsive and performs well under heavy loads.

2. **Reliability and Availability:** AWS offers highly reliable and available services that help ensure your web application stays up and running. You can leverage AWS's managed services like Amazon RDS (Relational Database Service) to host your MariaDB database, which provides **automated backups**, automated software patching, and multi-Availability Zone (AZ) deployments for high availability. Additionally, AWS provides services like Amazon S3 (Simple Storage Service) to store and serve static assets like HTML, CSS, and JavaScript files reliably.

3. **Security:** AWS provides robust security features to protect your applications and data. You can implement security best practices such as using Amazon VPC (Virtual Private Cloud) to isolate your application resources, configuring security groups and network ACLs (Access Control Lists) to control inbound and outbound traffic, and using AWS Identity and Access Management (IAM) to manage user access and permissions. AWS also offers services like AWS WAF (**Web Application Firewall**) to protect your application from common web attacks.

4. **Elasticity:** With AWS, you can easily handle variable workloads by leveraging services like AWS Auto Scaling. This allows you to automatically scale your application resources based on predefined rules, ensuring that you have the right amount of compute resources available at all times. This elasticity helps optimize costs by scaling resources up during peak demand and down during periods of lower traffic.

5. **Managed Services:** AWS offers a wide range of managed services that can simplify your development and deployment process. For example, you can use AWS Elastic Beanstalk to easily deploy and manage your PHP and Laravel applications without worrying about the underlying infrastructure. AWS Lambda enables you to run serverless functions for specific tasks, which can be helpful for implementing lightweight APIs or performing serverless computations.

6. **Integration with AWS Services:** AWS provides a rich ecosystem of services that can be integrated with your Laravel, PHP, and React/JS applications. For example, you can leverage services like Amazon SNS (Simple Notification Service) or Amazon SQS (Simple Queue Service) for event-driven communication or message queuing, and Amazon SES (**Simple Email Service**) for managing automated emails.

7. **Monitoring and Analytics:** AWS offers various monitoring and analytics tools to help you gain insights into your application's performance and user behavior. You can use services like Amazon CloudWatch for monitoring application metrics, AWS X-Ray for tracing and debugging requests, and Amazon Kinesis for real-time data streaming and analytics.

By combining Laravel, PHP, MariaDB, REST API, React/JS, and HTML5 with the capabilities provided by AWS, you can build highly scalable, reliable, secure, and cost-effective web applications. AWS's extensive suite of services and tools empowers developers to focus on application development while leveraging managed services for infrastructure, security, monitoring, and other critical aspects of the development lifecycle.

# Glossary

- **Admin** - Administrative functions related to the management of a CMS or organization.
- **Attendance** - The record of presence or absence of individuals for scheduled activities or events.
- **Attendance Summary Report** - A report that details the attendance records for a specific period or event.
- **Business** - An entity involved in commercial, industrial, or professional activities.
- **Business Branch** - A subsidiary part of a business that operates semi-independently.
- **CASAS Skill Gain Report** - A report detailing the skill gains measured by CASAS assessments over a specific period.
- **CMS** (Customer Management System) - A software that helps businesses manage customer data, interactions, and processes related to customer care, thereby improving customer satisfaction and retention. Today this kind of system is called a CRM.
- **cmsID** - Unique number generated by the database for each person
- **Contracts** - Legally binding agreements between two or more parties.
- **Contract Printing** - The ability to print a physical copy of a digital contract.
- **Contract Template Editing** - The modification of existing templates used in contract creation within a CMS.
- **Contract Templates Administration** - Management of the various templates used for creating contracts within a system.
- **Creating a New Staff User** - The process of adding a new user to the system with specified roles and permissions.
- **Creating a New Workshop** - The process of organizing and setting up a new educational or training session known as a workshop.
- **Current Job Openings Grid** - A display of all available job positions currently open within an organization.
- **Deactivating A Staff User** - The process of removing a user's active status within the system, preventing them from logging in or accessing system resources.
- **Drop Codes** - Codes used to categorize or indicate reasons why a service or enrollment was dropped or terminated.
- **EdLevel Ranges** - Designations used to categorize educational levels or achievements within a system.
- **Enrollment** - The process of registering or entering someone into a system or service.
- **Enrollment Entry/Edit Screen** - The user interface where enrollment details are entered or modified.
- **Entity Relationship Diagram (ERD)** - A graphical representation of entities and their relationships to each other, typically used in database design.
- **Excuses** - Predefined or user-defined reasons for absences or other exceptions within a system.
- **Exclude Codes** - Specific codes used to exclude certain data or entries from reports or queries within a system.
- **Finding Contracts** - The process of searching and retrieving contract details within a system.
- **Finding Workshops** - The method by which users locate scheduled or available workshops within a system.
- **FTE Enrollment Report** - A report detailing full-time equivalent student enrollments.

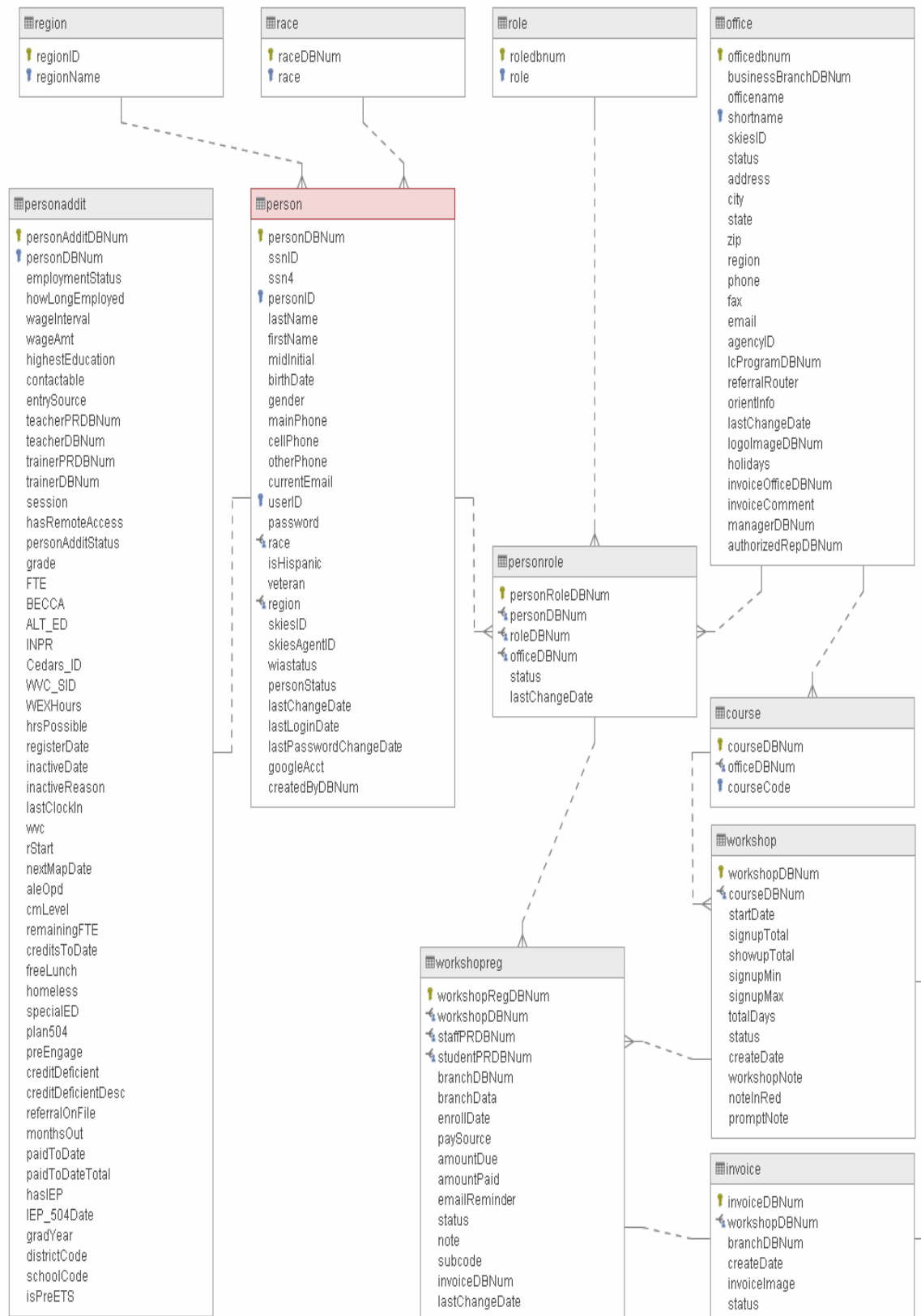


- **Fund** - Financial resources designated for specific purposes within an organization, managed through the CMS.
- **Groups** - Defined sets of users or entities within a system, grouped by common criteria.
- **HSE/Diploma Report** - A report documenting high school equivalency or diploma attainment.
- **Jobs** - Employment positions within an organization.
- **List of Job Families** - A categorized list of jobs grouped by similar occupational fields or functions.
- **Login Screen** - The interface where users enter credentials to access a system.
- **Office** - A designated area within an organization where administrative tasks are carried out.
- **Office Courses** - Educational or training courses administered at or by the office.
- **Office Detail** - Specific information regarding an office's operations, structure, or staff.
- **Office Rooms** - Specific rooms designated for office use within an organization.
- **Office Staff** - Employees assigned to work within a specific office.
- **Outcome Entry/Edit Screen** - The interface for entering or editing the results or outcomes associated with a student or group.
- **Participant Record** - A complete set of information about each person
- **Partial Participant Record** - The minimum pieces of information required to generate a cmsID.
- **Person Search** - A feature that allows users to look up individual records within a system.
- **Programs** - Organized sets of activities or curricula offered through an organization, managed via the CMS.
- **Record List Data Grid** - A table view that displays a list of records from a database.
- **Recording an Absence** - The act of documenting when a student or employee does not attend a scheduled session or day.
- **Reports** - Documents that collate and summarize data for analysis and decision-making.
- **Retention/Credential Report** - A report focusing on the retention rates and credentials obtained by students or participants.
- **Roles** - Designations within a system that define user permissions and responsibilities.
- **Roles Maintenance Screen** - An interface for managing and assigning roles within the CMS.
- **Roster Report** - A report listing all participants or students enrolled in a particular program or class.
- **School Days** - Specific days designated as operational or instructional within an educational institution.
- **Student Absence Report** - A report detailing the absences of students within an educational program or institution. This report can only be run on Fridays.
- **Student Clock-In Screen** - A digital interface used by students to mark their arrival and departure times.
- **Test Codes** - Codes used to categorize or identify specific tests or assessments within a system.
- **Upcoming Birthdays Report** - A report listing the upcoming birthdays of individuals within the organization or system.
- Using **Excel Pivot Tables** to Enhance CMS Reports - Utilizing Excel's pivot table feature to better analyze and visualize data from CMS reports.

- **Wizard** - In the context of software, a **wizard** is a user interface feature that guides users step-by-step through a process or task. Wizards are typically used in software applications to simplify complex or unfamiliar tasks by breaking them down into smaller, manageable steps. They often involve a sequence of screens or dialogs, each prompting the user to provide information, make choices, or review settings before moving on to the next step. In CMS, the Contracting System is wizard driven.
- **Workshop** - A brief intensive educational program for a small group which focuses on techniques and skills in a particular field.
- **Workshop Duplication Feature** - A system capability that allows users to replicate existing workshops for new sessions.

# Entity Relationship Diagram (ERD)

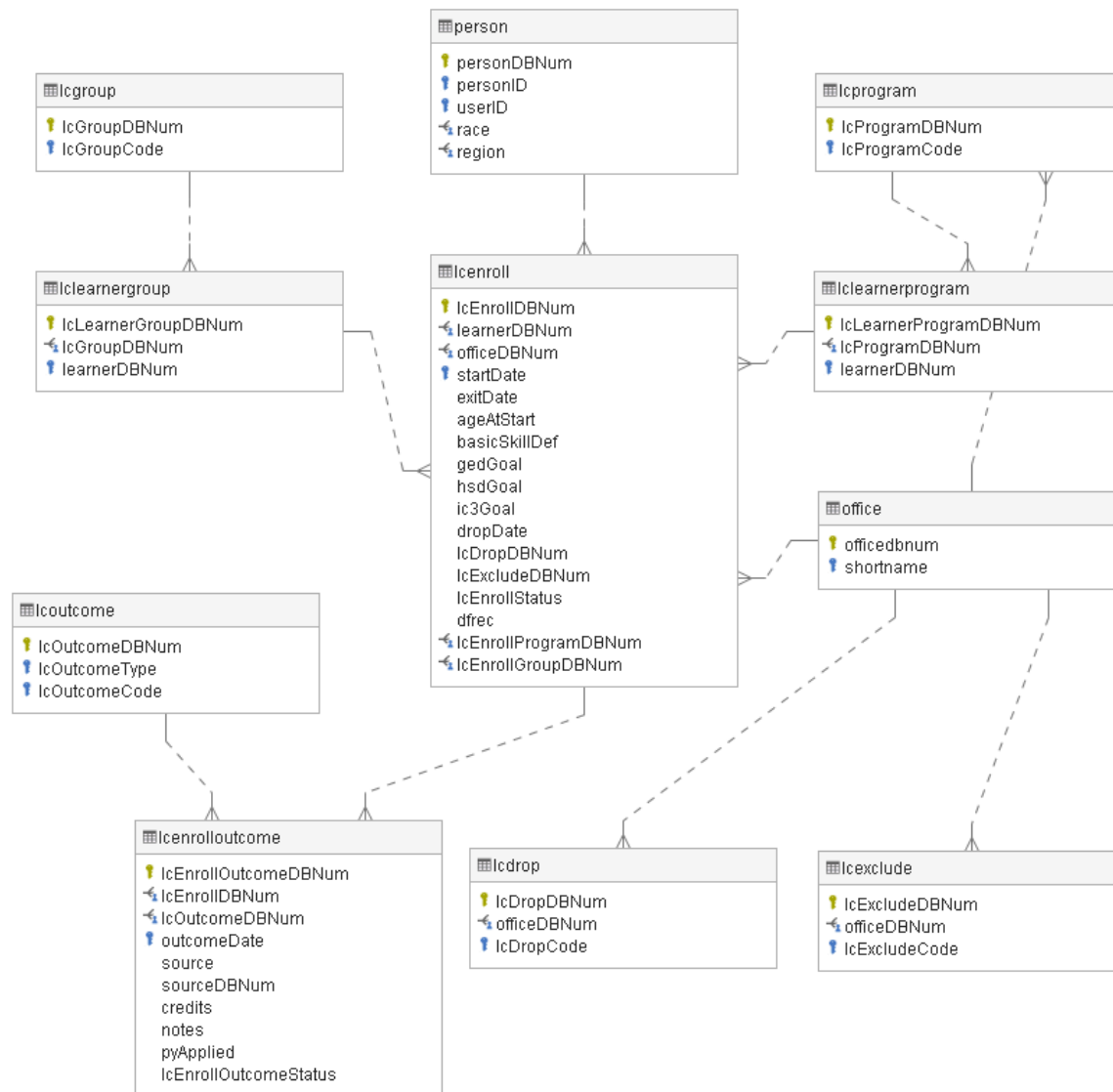
## Person and Workshop Information



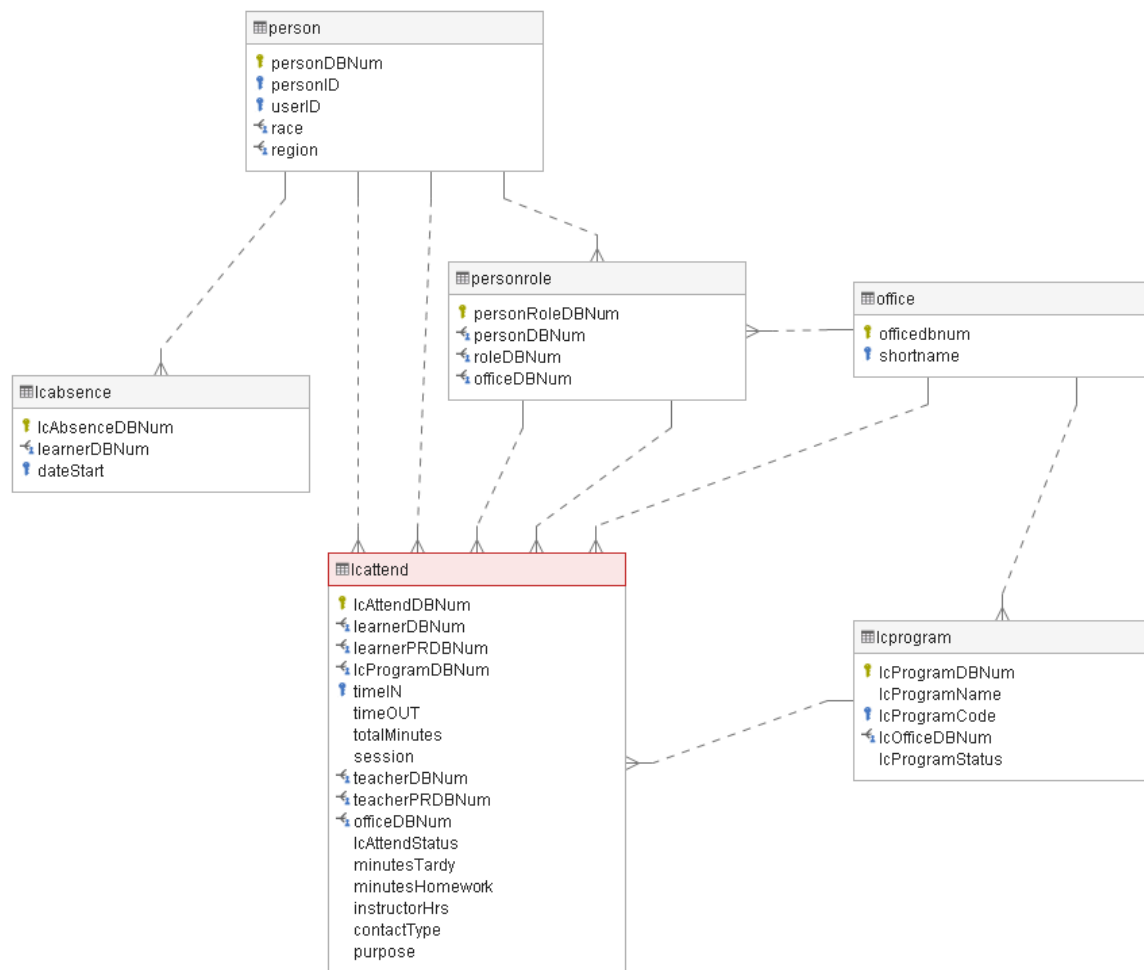
## ERD - Contracting System



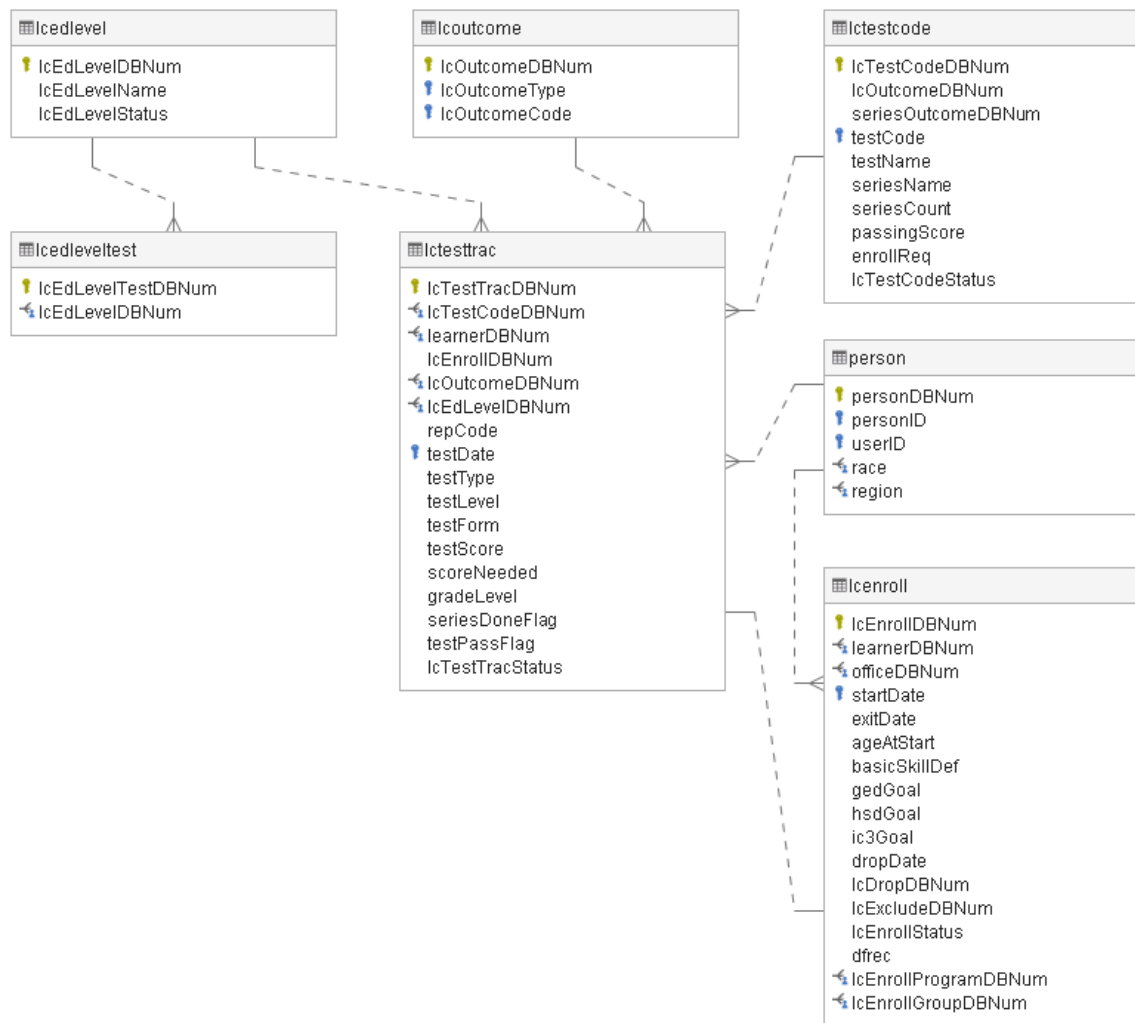
## ERD - Enrollment



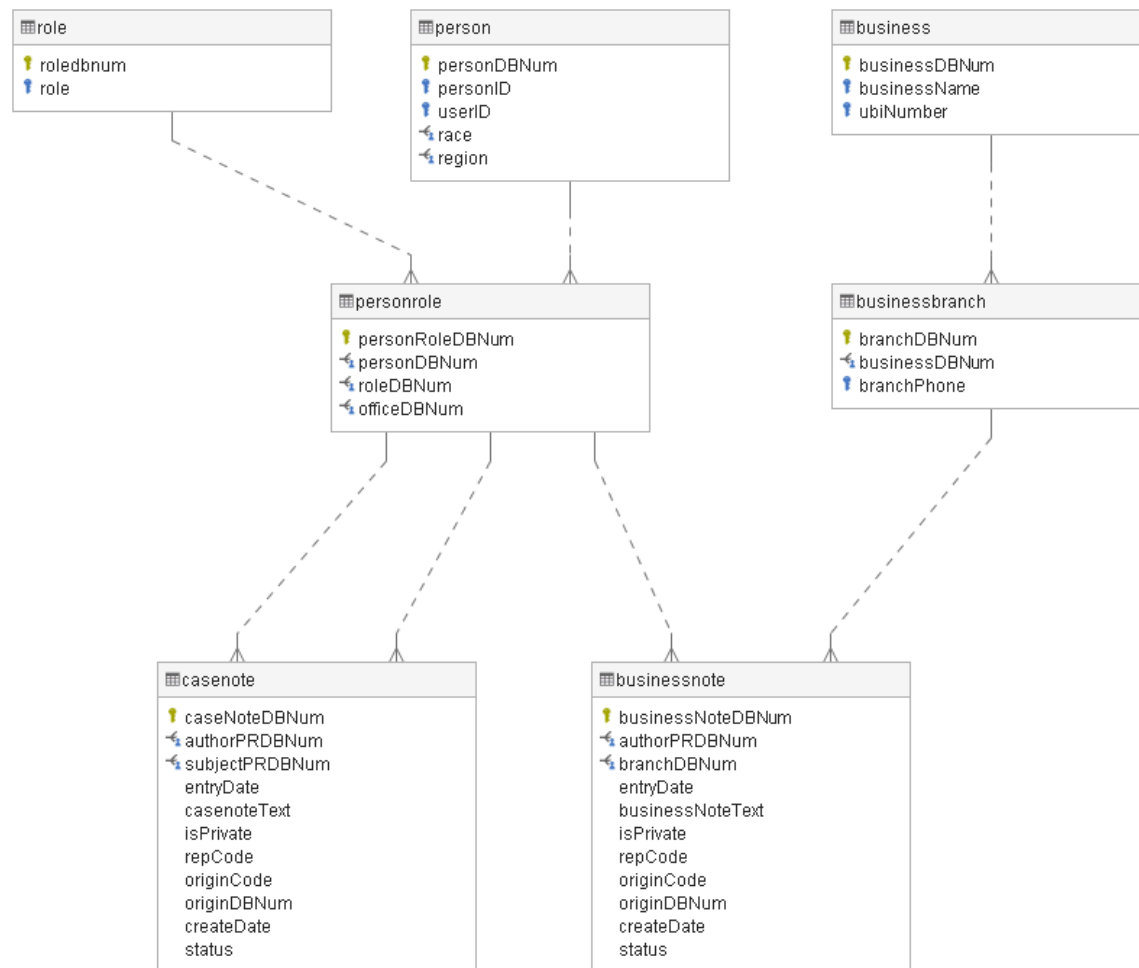
## ERD - Attendance



## ERD - Testing

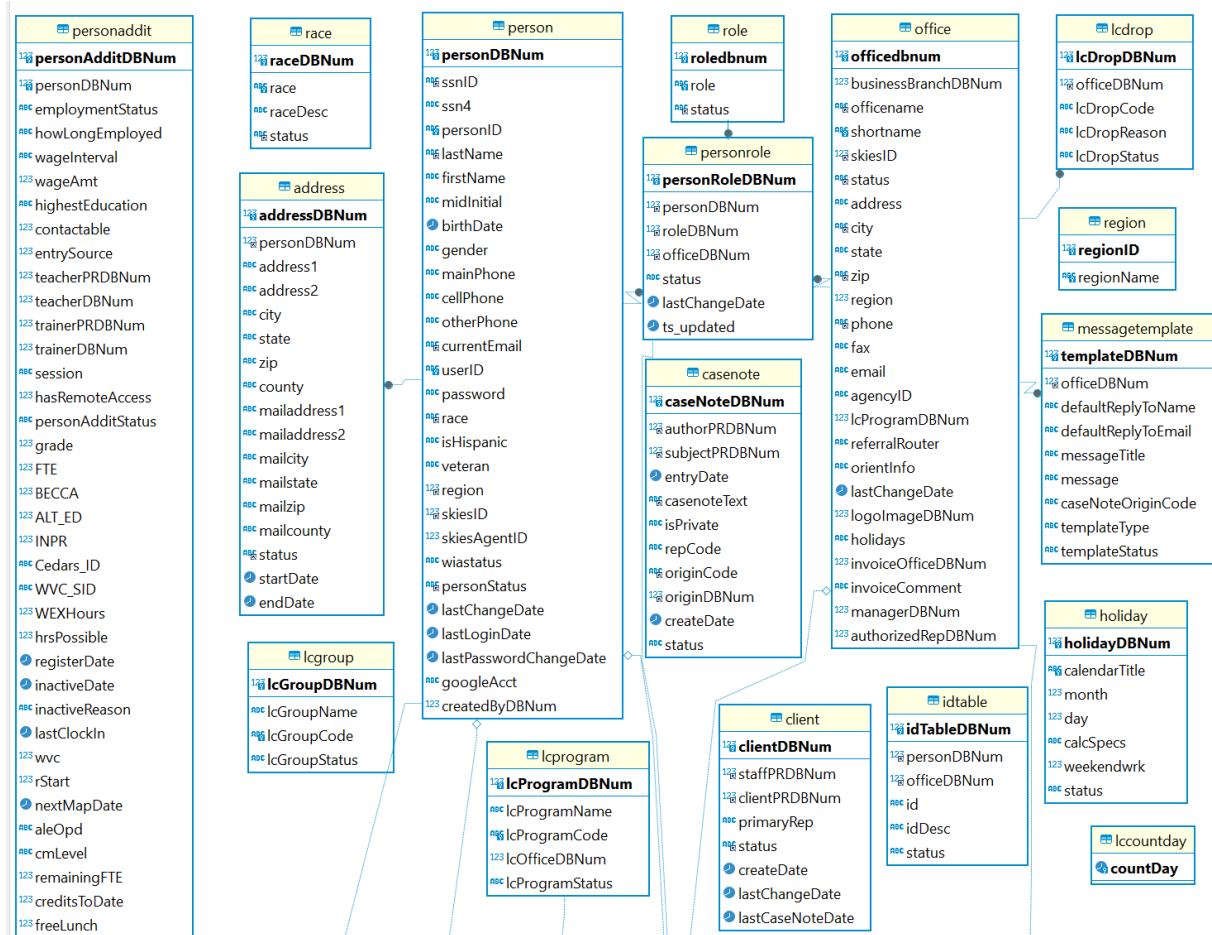


## ERD - Casenotes (participant and employer)

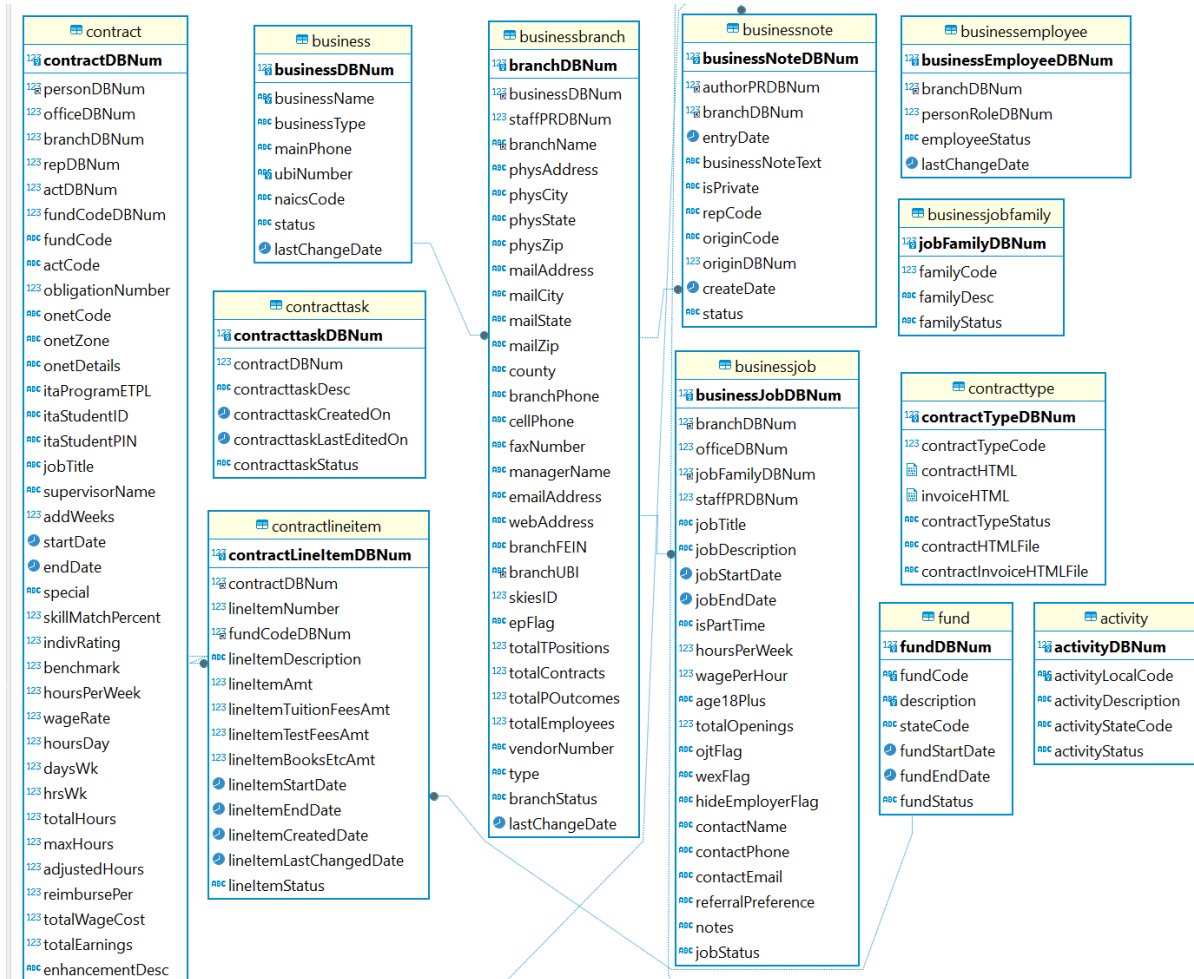


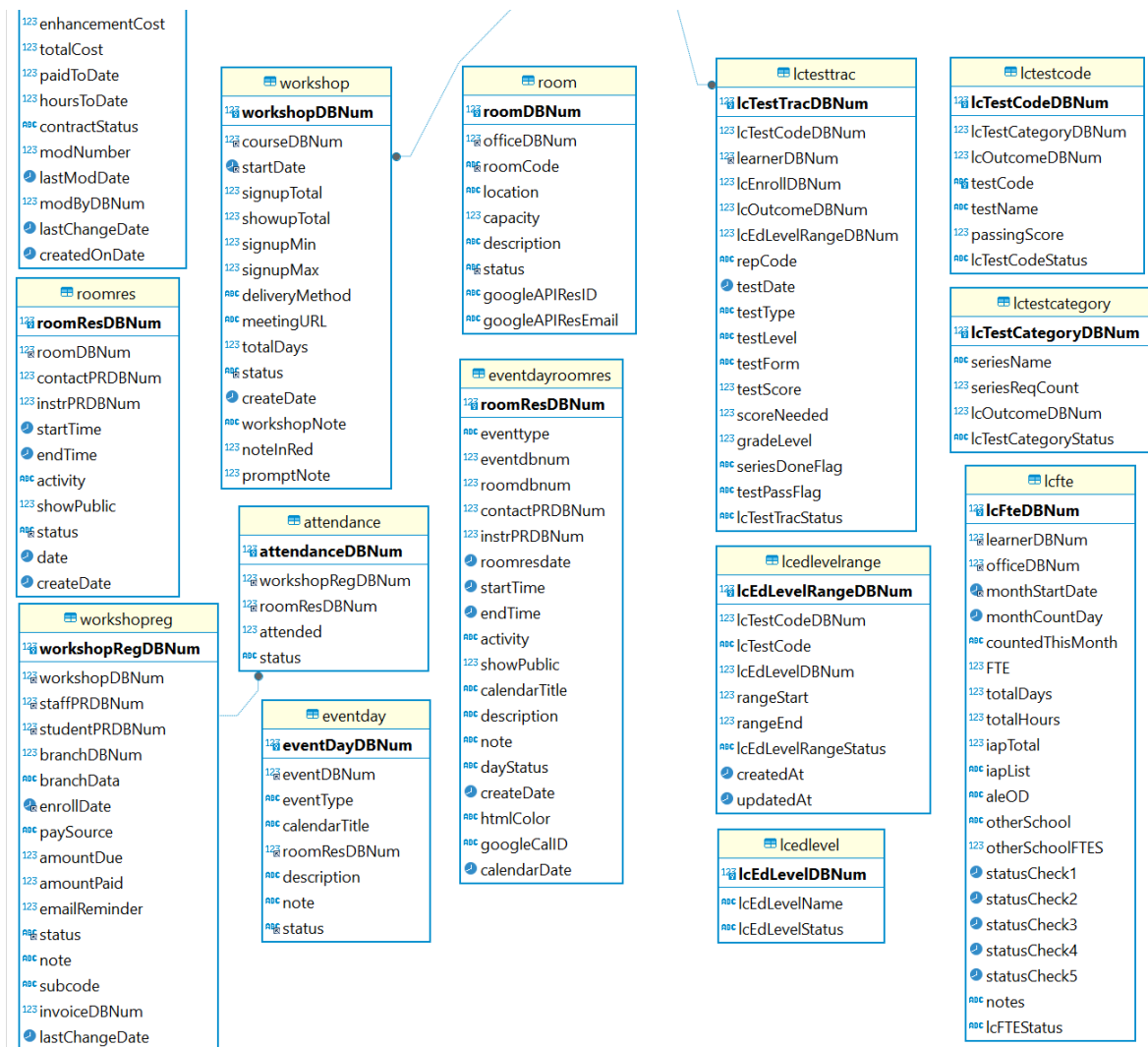


# Updated ERD As Of Jun 24, 2024









# CMS SQL Table and Field Names

## 1. Person Table (Parent Table)

```
CREATE TABLE `person` (  
  `personDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `ssnID` varchar(50) DEFAULT NULL,  
  `ssn4` varchar(50) DEFAULT NULL,  
  `personID` varchar(10) NOT NULL DEFAULT '',  
  `lastName` varchar(50) NOT NULL DEFAULT '',  
  `firstName` varchar(50) NOT NULL DEFAULT '',  
  `midInitial` char(1) NOT NULL DEFAULT '',  
  `birthDate` date NOT NULL DEFAULT '3000-01-01',  
  `gender` char(1) NOT NULL DEFAULT '',  
  `mainPhone` varchar(15) NOT NULL DEFAULT '',  
  `cellPhone` varchar(15) NOT NULL DEFAULT '',  
  `otherPhone` varchar(15) NOT NULL DEFAULT '',  
  `currentEmail` varchar(120) NOT NULL DEFAULT '',  
  `userID` varchar(120) NOT NULL DEFAULT '',  
  `password` varchar(50) NOT NULL DEFAULT '',  
  `race` varchar(25) NOT NULL DEFAULT '',  
  `isHispanic` char(1) DEFAULT NULL,  
  `veteran` char(1) NOT NULL DEFAULT '',  
  `region` int(11) NOT NULL DEFAULT 0,  
  `skiesID` int(11) NOT NULL DEFAULT 0,  
  `wiastatus` char(1) NOT NULL DEFAULT '',  
  `personStatus` char(1) NOT NULL DEFAULT 'A',  
  `lastChangeDate` timestamp NOT NULL DEFAULT current_timestamp() ON UPDATE current_timestamp(),  
  `lastLoginDate` timestamp NOT NULL DEFAULT '0000-00-00 00:00:00',  
  `lastPasswordChangeDate` timestamp NOT NULL DEFAULT '0000-00-00 00:00:00',  
  PRIMARY KEY (`personDBNum`),  
  UNIQUE KEY `personID` (`personID`),  
  UNIQUE KEY `userID` (`userID`),  
  KEY `statusIndex` (`personStatus`),  
  KEY `lastNameIndex` (`lastName`)  
) ENGINE=InnoDB AUTO_INCREMENT=153491 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

## personaddit (one to one with Person)

```
CREATE TABLE `personaddit` (  
  `personAdditDBNum` int(10) unsigned NOT NULL AUTO_INCREMENT,  
  `personDBNum` int(11) DEFAULT NULL,  
  `employmentStatus` char(1) NOT NULL DEFAULT '',  
  `howLongEmployed` varchar(25) NOT NULL DEFAULT '',  
  `wageInterval` varchar(7) NOT NULL DEFAULT '',  
  `wageAmt` float NOT NULL DEFAULT 0,  
  `highestEducation` varchar(25) NOT NULL DEFAULT '',  
  `contactable` tinyint(1) NOT NULL DEFAULT 0,  
  `entrySource` int(10) unsigned NOT NULL DEFAULT 0,  
  `teacherPRDBNum` int(11) NOT NULL DEFAULT 0,  
  `teacherDBNum` int(10) unsigned NOT NULL DEFAULT 0,  
  `trainerPRDBNum` int(10) unsigned NOT NULL DEFAULT 0,  
  `trainerDBNum` int(10) unsigned NOT NULL DEFAULT 0,  
  `session` char(1) NOT NULL DEFAULT '',  
  `hasRemoteAccess` tinyint(1) NOT NULL DEFAULT 0,  
  `personAdditStatus` char(1) NOT NULL DEFAULT 'A',  
  `grade` int(10) unsigned NOT NULL DEFAULT 0,  
  `FTE` decimal(6,2) NOT NULL DEFAULT 0.00,  
  `BECCA` tinyint(1) NOT NULL DEFAULT 0,  
  `ALT_ED` tinyint(1) NOT NULL DEFAULT 0,  
  `INPR` tinyint(1) NOT NULL DEFAULT 0,  
  `Cedars_ID` varchar(15) DEFAULT NULL,  
  `WVC_SID` varchar(15) NOT NULL DEFAULT '',  
  `WEXHours` decimal(6,2) NOT NULL DEFAULT 0.00,  
  `hrsPossible` decimal(6,2) NOT NULL DEFAULT 0.00,  
  `registerDate` date NOT NULL DEFAULT '0000-00-00',  
  `inactiveDate` date NOT NULL DEFAULT '0000-00-00',  
  `inactiveReason` varchar(20) NOT NULL DEFAULT '',  
  `lastClockIn` datetime DEFAULT '0000-00-00 00:00:00',  
  `wvc` tinyint(3) unsigned NOT NULL DEFAULT 0,  
  `rStart` tinyint(3) unsigned NOT NULL DEFAULT 0,  
  `nextMapDate` date NOT NULL DEFAULT '0000-00-00',  
  `aleOpd` char(1) NOT NULL DEFAULT '',  
  `cmLevel` char(1) NOT NULL DEFAULT '0',  
  `remainingFTE` decimal(6,1) DEFAULT 0.0,  
  `creditsToDate` decimal(6,1) DEFAULT 0.0,  
  `freeLunch` int(1) DEFAULT 0,  
  `homeless` int(1) DEFAULT 0,
```

```

`specialED` int(1) DEFAULT 0,
`plan504` int(1) DEFAULT 0,
`preEngage` int(1) DEFAULT 0,
`creditDeficient` int(1) DEFAULT 0,
`creditDeficientDesc` varchar(60) DEFAULT '',
`referralOnFile` int(1) DEFAULT 0,
`monthsOut` int(2) DEFAULT 0,
`paidToDate` decimal(6,0) DEFAULT 0,
`paidToDateTotal` decimal(8,2) DEFAULT 0.00,
`hasIEP` tinyint(3) unsigned NOT NULL DEFAULT 0,
`IEP_504Date` date DEFAULT NULL,
`gradYear` int(10) unsigned DEFAULT NULL,
`districtCode` varchar(10) DEFAULT '',
`schoolCode` int(10) unsigned DEFAULT NULL,
`isPreETS` char(1) DEFAULT NULL,
PRIMARY KEY (`personAdditDBNum`),
UNIQUE KEY `PersonDBNumIndex` (`personDBNum`)
) ENGINE=InnoDB AUTO_INCREMENT=25829 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;

```

## 2. Office Table (Parent Table)

```

CREATE TABLE `office` (
  `officedbnum` int(11) NOT NULL AUTO_INCREMENT,
  `businessBranchDBNum` int(11) NOT NULL DEFAULT 0,
  `officename` varchar(50) NOT NULL DEFAULT '',
  `shortname` varchar(10) NOT NULL DEFAULT '',
  `status` char(1) NOT NULL DEFAULT '',
  `address` varchar(100) NOT NULL DEFAULT '',
  `city` varchar(50) NOT NULL DEFAULT '',
  `state` char(2) NOT NULL DEFAULT '',
  `zip` varchar(10) NOT NULL DEFAULT '',
  PRIMARY KEY (`officedbnum`),
  UNIQUE KEY `shortNameIndex` (`shortname`),
  KEY `statusIndex` (`status`)
) ENGINE=InnoDB AUTO_INCREMENT=48 DEFAULT CHARSET=latin1
COLLATE=latin1_swedish_ci;

```

### 3. Business Table (Parent Table)

```
CREATE TABLE `business` (  
  `businessDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `businessName` varchar(50) NOT NULL DEFAULT '',  
  `businessType` varchar(20) NOT NULL DEFAULT '',  
  `mainPhone` varchar(10) NOT NULL DEFAULT '',  
  `ubiNumber` varchar(12) NOT NULL DEFAULT '',  
  `naicsCode` varchar(8) NOT NULL,  
  `status` char(1) NOT NULL DEFAULT '',  
  PRIMARY KEY (`businessDBNum`),  
  UNIQUE KEY `bisNameIndex` (`businessName`)  
) ENGINE=InnoDB AUTO_INCREMENT=25671 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

### 4. Contract Table (References Person and Office)

```
CREATE TABLE `contract` (  
  `contractDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `personDBNum` int(11) NOT NULL DEFAULT 0,  
  `officeDBNum` int(11) NOT NULL DEFAULT 0,  
  `startDate` date NOT NULL DEFAULT '0000-00-00',  
  `endDate` date DEFAULT NULL,  
  `contractStatus` char(1) NOT NULL DEFAULT 'A',  
  PRIMARY KEY (`contractDBNum`),  
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`),  
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officedbnum`)  
) ENGINE=InnoDB AUTO_INCREMENT=2881 DEFAULT CHARSET=utf8  
COLLATE=utf8_general_ci;
```



## 5. Address Table (References Person)

```
CREATE TABLE `address` (  
  `addressDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `personDBNum` int(11) NOT NULL DEFAULT 0,  
  `address1` varchar(80) NOT NULL DEFAULT '',  
  `city` varchar(40) NOT NULL DEFAULT '',  
  `state` char(2) NOT NULL DEFAULT '',  
  `zip` varchar(10) NOT NULL DEFAULT '',  
  `status` char(1) NOT NULL DEFAULT '',  
  PRIMARY KEY (`addressDBNum`),  
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`)  
) ENGINE=InnoDB AUTO_INCREMENT=192466 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

## 6. Role and PersonRole Tables

```
CREATE TABLE `personrole` (  
  `personRoleDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `personDBNum` int(11) NOT NULL DEFAULT 0,  
  `roleDBNum` int(11) NOT NULL DEFAULT 0,  
  `officeDBNum` int(11) NOT NULL DEFAULT 0,  
  `status` char(1) NOT NULL DEFAULT 'A',  
  PRIMARY KEY (`personRoleDBNum`),  
  FOREIGN KEY (`personDBNum`) REFERENCES `person` (`personDBNum`),  
  FOREIGN KEY (`roleDBNum`) REFERENCES `role` (`roleDBNum`),  
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officeDBNum`)  
) ENGINE=InnoDB AUTO_INCREMENT=198723 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

```
CREATE TABLE `role` (  
  `roledbnum` int(11) NOT NULL AUTO_INCREMENT,  
  `role` varchar(30) NOT NULL DEFAULT '',  
  `status` char(1) NOT NULL DEFAULT '',  
  PRIMARY KEY (`roledbnum`),  
  UNIQUE KEY `roleIndex` (`role`),  
  KEY `statusIndex` (`status`)  
) ENGINE=InnoDB AUTO_INCREMENT=18 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

## 7. LCEnroll Table (References Person and Office)

```
CREATE TABLE `lcenroll` (  
  `lcEnrollDBNum` int(10) unsigned NOT NULL AUTO_INCREMENT,  
  `learnerDBNum` int(11) DEFAULT NULL,  
  `officeDBNum` int(11) DEFAULT NULL,  
  `startDate` date NOT NULL DEFAULT '0000-00-00',  
  `exitDate` date NOT NULL DEFAULT '0000-00-00',  
  `lcEnrollStatus` char(1) NOT NULL DEFAULT 'A',  
  PRIMARY KEY (`lcEnrollDBNum`),  
  FOREIGN KEY (`learnerDBNum`) REFERENCES `person` (`personDBNum`),  
  FOREIGN KEY (`officeDBNum`) REFERENCES `office` (`officedbnum`)  
) ENGINE=InnoDB AUTO_INCREMENT=9936 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

## 8. LCGroup Table (References Learner Group)

```
CREATE TABLE `lcgroup` (  
  `lcGroupDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `lcGroupName` varchar(150) NOT NULL DEFAULT '',  
  `lcGroupStatus` char(1) NOT NULL DEFAULT 'A',  
  PRIMARY KEY (`lcGroupDBNum`)  
) ENGINE=InnoDB AUTO_INCREMENT=78 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

## 9. LC Learner Group Table (References Person and Group)

```
CREATE TABLE `lclearnergroup` (  
  `lcLearnerGroupDBNum` int(11) NOT NULL AUTO_INCREMENT,  
  `lcGroupDBNum` int(11) NOT NULL DEFAULT 0,  
  `learnerDBNum` int(11) NOT NULL DEFAULT 0,  
  `lcLearnerGroupStatus` char(1) NOT NULL DEFAULT 'A',  
  PRIMARY KEY (`lcLearnerGroupDBNum`),  
  FOREIGN KEY (`learnerDBNum`) REFERENCES `person` (`personDBNum`),  
  FOREIGN KEY (`lcGroupDBNum`) REFERENCES `lcgroup` (`lcGroupDBNum`)  
) ENGINE=InnoDB AUTO_INCREMENT=11928 DEFAULT CHARSET=latin1  
COLLATE=latin1_swedish_ci;
```

# How To Install DBeaver (Database Manager)

Here's a simple step-by-step guide to install DBeaver, a database management tool: You will need this tool or something similar to run SQL queries like the ones in the next section.

## Step 1: Download DBeaver

1. Go to the [official DBeaver website](#).
2. Click on the Download button.
3. Choose the DBeaver Community edition (which is free) unless you need the Enterprise edition.
4. Select your operating system (Windows, macOS, or Linux) and click Download.

## Step 2: Install DBeaver on Windows or macOS

For Windows:

1. Once the download is complete, locate the `.exe` file in your Downloads folder.
2. Double-click the `.exe` file to start the installation process.
3. Follow the on-screen instructions. You may be prompted to:
  - Choose the installation directory.
  - Select additional components (such as JRE if you don't have it installed).
4. Click Next and then Install.
5. Once the installation is complete, click Finish.

For macOS:

1. Open the `.dmg` file you downloaded.
2. Drag and drop the DBeaver icon into the Applications folder.
3. Go to your Applications folder, find DBeaver, and double-click to launch it.

## Step 3: Launch DBeaver

1. After installation, open DBeaver from the Start menu (Windows), Launchpad (macOS), or search for it in your application menu (Linux).
2. You can now set up connections to your databases and begin using DBeaver.

**Note:** In order to connect DBeaver to the CMS database you will need to contact the database administrator for authentication details and training.

# Introduction to SQL and MariaDB

Welcome to this beginner-friendly tutorial on SQL (Structured Query Language) using MariaDB! If you're new to databases and SQL, you're in the right place. This guide will introduce you to the basics of SQL and show you how to interact with a database using example tables. We'll focus on querying data without modifying it, so you won't need to worry about inserting, updating, or deleting information.

## What is SQL?

SQL is a standard language used to communicate with relational databases. It allows you to retrieve, manipulate, and manage data stored in tables.

## What is MariaDB?

MariaDB is an open-source relational database management system (RDBMS) that is a fork of MySQL. It's widely used for its reliability, performance, and ease of use.

# Understanding the Database Tables

Before we dive into SQL queries, let's familiarize ourselves with the tables we'll be using. Imagine we're managing data for a company that deals with people, businesses, and contracts. Here are the tables:

1. **Person**: Contains personal information about individuals.
2. **PersonAddit**: Additional information related to a person..
3. **Office**: Information about different office locations.
4. **Business**: Details of businesses associated with the company.
5. **Contract**: Records of contracts between persons and offices.
6. **Address**: Addresses associated with persons.
7. **Role and PersonRole**: Roles that a person has within an office.

# Basic SQL Queries

## 1. Selecting All Data from a Table

To view all data from a table, use the **SELECT** statement with the **\*** wildcard.

```
SELECT * FROM person;
```

This query retrieves all columns and rows from the **person** table.

## 2. Selecting Specific Columns

If you want to see only certain columns, specify them in the `SELECT` clause.

```
SELECT firstName, lastName, birthDate FROM person;
```

This retrieves the first name, last name, and birth date of all persons.

## 3. Using WHERE Clause to Filter Data

The `WHERE` clause allows you to filter records based on conditions.

### Example: Find Persons by Last Name

```
SELECT firstName, lastName FROM person  
WHERE lastName = 'Smith';
```

This retrieves the first and last names of all persons whose last name is 'Smith'.

### Example: Find Persons Born After a Certain Date

```
SELECT firstName, lastName, birthDate FROM person  
WHERE birthDate > '1990-01-01';
```

This retrieves persons born after January 1, 1990.

## 4. Sorting Results with ORDER BY

Use `ORDER BY` to sort the results.

### Example: Sort Persons by Last Name

```
SELECT firstName, lastName FROM person  
ORDER BY lastName ASC;
```

This sorts the results alphabetically by last name in ascending order.

## 5. Joining Tables

To combine data from multiple tables, use `JOIN`.

### Example: Retrieve Person and Their Address

Suppose we want to get the names and addresses of all persons.

```
SELECT person.firstName, person.lastName, address.address1,  
address.city, address.state, address.zip  
FROM person  
JOIN address ON person.personDBNum = address.personDBNum;
```

This joins the `person` and `address` tables where their `personDBNum` fields match.

### Understanding the Query

- `person.firstName`: Specifies the `firstName` column from the `person` table.
- `JOIN address ON person.personDBNum = address.personDBNum`: Joins the `address` table where the `personDBNum` matches in both tables.

## 6. Using Aliases for Simplicity

Aliases can simplify queries by giving tables temporary names.

```
SELECT p.firstName, p.lastName, a.address1, a.city, a.state, a.zip  
FROM person AS p  
JOIN address AS a ON p.personDBNum = a.personDBNum;
```

Here, `p` is an alias for `person`, and `a` is an alias for `address`.

## 7. Filtering Joined Data

You can add a `WHERE` clause to filter joined data.

### Example: Persons in a Specific City

```
SELECT p.firstName, p.lastName, a.city  
FROM person AS p  
JOIN address AS a ON p.personDBNum = a.personDBNum  
WHERE a.city = 'Seattle';
```

This retrieves names of persons who live in Seattle.

## 8. Using Aggregate Functions

Aggregate functions perform calculations on multiple rows.

### Example: Count Number of Persons

```
SELECT COUNT(*) AS totalPersons FROM person;
```

This returns the total number of persons in the `person` table.

### Example: Grouping Data

Suppose we want to find out how many persons are in each city.

```
SELECT a.city, COUNT(*) AS numPersons
FROM address AS a
GROUP BY a.city;
```

This groups the data by city and counts the number of persons in each.

## 9. Joining Multiple Tables

You can join more than two tables in a single query.

### Example: Persons, Their Roles, and Offices

```
SELECT p.firstName, p.lastName, r.role, o.officename
FROM person AS p
JOIN personrole AS pr ON pr.personDBNum = p.personDBNum
JOIN role      AS r  ON r.roleDBNum    = pr.roleDBNum
JOIN office    AS o  ON o.officeDBNum  = pr.officeDBNum;
WHERE
    pr.status = 'A' AND r.role = 'STAFF'
ORDER BY o.officename
```

This retrieves the names of Staff persons(those with a STAFF role), and the office they are associated with.

| Person | Role | Office |
|--------|------|--------|
|--------|------|--------|

|   |  |   |
|---|--|---|
| \ |  | / |
|---|--|---|

PersonRole

# Putting It All Together

## Example Scenario: Finding Active Contracts

Suppose we want to find all active contracts, including the person's name and the office name.

```
SELECT p.firstName, p.lastName, o.officename, c.startDate, c.endDate
FROM contract AS c
JOIN person AS p ON p.personDBNum = c.personDBNum
JOIN office AS o ON o.officeDBNum = c.officedbnum
WHERE c.contractStatus = 'A';
```

### Explanation

- `contract AS c`: Alias `c` for the `contract` table.
- `JOIN person AS p ON c.personDBNum = p.personDBNum`: Join `person` table to get person's details.
- `JOIN office AS o ON c.officeDBNum = o.officedbnum`: Join `office` table to get office details.
- `WHERE c.contractStatus = 'A'`: Filter contracts where the status is 'Active'.

## Tips for Writing SQL Queries

- **Start Simple**: Begin with basic `SELECT` statements and gradually add complexity.
- **Use Aliases**: They make your queries cleaner and easier to read.
- **Test Incrementally**: Run your queries step by step to ensure each part works.
- **Readability Matters**: Use proper indentation and line breaks for complex queries.

## Conclusion

Congratulations! You've taken your first steps into the world of SQL with MariaDB. We've covered how to select data from tables, filter results, sort data, and join tables to retrieve related information. Remember, practice is key to becoming proficient in SQL. Try creating your own queries using these tables to reinforce what you've learned.



# Additional Resources

- **MariaDB Documentation:** <https://mariadb.com/kb/en/documentation/>
- **SQL Tutorial:** <https://www.w3schools.com/sql/>
- **Database Design Basics:** Understanding how tables relate can help you write better queries.

# NON-DISCLOSURE AGREEMENT (NDA)

For WIOA Employees with Access to the CMS Database

This Non-Disclosure Agreement is entered into on this \_\_\_\_\_ by and between:

**SKILLSOURCE** ("Disclosing Party"),

and

**Employee Name:** \_\_\_\_\_ ("Receiving Party").

## 1. Purpose

The purpose of this Agreement is to protect the confidentiality of Personally Identifiable Information ("PII") stored in the CMS (Case Management System) database, which the Employee may access in the course of their employment under the Workforce Innovation and Opportunity Act ("WIOA").

## 2. Confidential Information

Confidential Information includes, but is not limited to, the following types of information contained within the CMS database:

- Names, addresses, and contact details.
- Social Security Numbers (SSNs).
- Employment histories, records, and status.
- Financial data, income information, and benefits.
- Any other PII or sensitive data relating to individuals in the system.

## 3. Obligations of the Employee

The Employee agrees to the following:

- To treat all information contained in the CMS database as strictly confidential.
- To use the PII only for legitimate WIOA purposes and never for personal or non-work-related use.
- Not to disclose any PII or related data to unauthorized individuals, third parties, or external entities.
- To take reasonable measures to safeguard the CMS data and prevent unauthorized access or breaches.

## 4. Exceptions to Confidentiality

The Employee's obligations under this Agreement do not extend to information that:

- Is or becomes public knowledge through no fault of the Employee.

- Is required to be disclosed by law, provided the Employee gives prompt notice to the Disclosing Party so that appropriate protective measures may be taken.

## **5. Duration of Confidentiality Obligations**

The confidentiality obligations under this Agreement shall remain in effect during the term of employment and for a period of **two (2) years** following the termination of the Employee's employment, regardless of the reason for termination.

## **6. Breach of Agreement**

If the Employee breaches this Agreement, the Disclosing Party may seek injunctive relief and any other legal remedies available, including compensatory damages.

## **7. Return of Materials**

Upon termination of the Employee's employment, or upon request by the Disclosing Party, the Employee shall promptly return all materials, documents, and records related to CMS, including any copies thereof.

## **8. Miscellaneous**

- This Agreement constitutes the entire understanding between the parties concerning the subject matter herein.
- This Agreement may not be amended or modified except in writing signed by both parties.
- If any provision of this Agreement is found to be unenforceable, the remaining provisions shall remain in full force and effect.

## **9. Governing Law**

This Agreement shall be governed by and construed in accordance with the laws of the State of **Washington**.

## **10. Signatures**

By signing below, the Employee agrees to the terms and conditions outlined in this Non-Disclosure Agreement.

**Disclosing Party:**

**SKILLSOURCE**

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Employee:** \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_