GRANTEE PERFORMANCE MANAGEMENT SYSTEM (GPMS)

PREVIEW 2
CASE MANAGERS
SEGMENT A - CREATING A CASE
CASE MANAGER

SEGMENT A – CREATING A PARTICIPANT CASE
ACCESSING GPMS

All users must login to GPMS

To login:

1. Open web browser (We recommend Internet Explorer and/or all browsers that the GPMS supports), enter the following website in the address bar: https://dol.appiancloud.com/suite/

2. Accept the Rules of Behavior by reading and selecting the “I Agree” button.

3. Enter your User Name and Password.
   a. If you’ve forgotten your password, select the “Forgot Your Password” link.
   b. Enter your Login ID and an e-mail will be sent with a link to reset the password.

4. Select the “Sign In” button.

5. The landing page is the “SCSEP Cases” tab.
Fraud and related activity in connection with computers is prohibited by Title 18, U.S. Code Section 1030. Furthermore, this law states that intentionally accessing a computer without authorization or exceeding authorized access and thereby obtaining information from any department or agency of the United States is prohibited and subject to civil and criminal penalties, including (but not limited to), punishment by fine and/or imprisonment. Additionally, DOL may provide law enforcement with any potential evidence of a crime found on aforementioned systems in order for them to investigate such offenses.

WARNING...WARNING...WARNING...WARNING...WARNING

I AGREE
LOG IN
ENTER USERNAME AND PASSWORD
After logging into the system, the “SCSEP Cases” landing page will display.
It is essential to “SEARCH” for a Participant prior to trying to adding a new case. The Case Manager should ensure that the applicant does not currently exist in GPMS before creating a new Participant case.
STEP 1:

To search-

a. Enter the last name or partial last name in the “Search” field on the SCSEP Cases page.

b. Click on the “Search” button.

c. The search results will either show that the specific Participant case exist or if there are no cases that meet the search criteria.
If a Participant case exist in GPMS, under “Participant Cases” you will see the specific case information.

Review the summary and verify whether or not the applicant is the same individual in the system. Conduct the necessary research and verification before you proceed. The Participant case information can be viewed by clicking on each “blue” action link located under the participant name.
If a Participant Case *does not exist* in GPMS, your search outcome will display *“No Cases Are Available.”*

You are now ready to enter a new Participant Case!
Participant Cases

ADD NEW CASE
**STEP 2:**
On the “SCSEP Cases” landing page Click “ADD NEW CASE.”
When “ADD NEW CASE” is clicked, the following page will display.

Enter all pertinent information. All fields with an *asterisk* (*) are required fields and must be completed in order to move to the next page.
If all required fields are not completed, the following error message will appear in **red**.

If the age requirement is not met, this error message will appear.
Review and make all necessary corrections in order to move to the next page.
When all corrections have been made, click the “CONTINUE” button.

When you click “CONTINUE,” the “Enter Case Details” page appears next.
The “Enter Case Details” page is where you begin the INTAKE process in GPMS.

NOTE: The information previously entered on the “Participant Details” page will auto-populate the “Participant Information” section. Let’s now begin the “Intake” process!
STEP 3:
You are now in the “Intake” section. On the “Enter Case Details” page, enter all pertinent information on the “Participant Information” section. Use the dropdown button to select “Employment Status.”

Reminder: All fields with an asterisk(*) are required and must be completed.
Continue to enter information on the “Enter Case Detail” page. You will see dropdown buttons for State and County.

<table>
<thead>
<tr>
<th>Physical Address</th>
<th>Mailing Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address Line 1 *</td>
<td></td>
</tr>
<tr>
<td>4200 Usdol Drive</td>
<td></td>
</tr>
<tr>
<td>Address Line 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>City *</td>
<td>State *</td>
</tr>
<tr>
<td>Washington</td>
<td>District of Columbia</td>
</tr>
<tr>
<td>Zip *</td>
<td>61200</td>
</tr>
<tr>
<td>Zip+4</td>
<td></td>
</tr>
</tbody>
</table>

If “Check if Available” is selected, additional contact information fields will appear under “Secondary Contact Information.” As a best practice – including secondary contact information can serve as the Participant's emergency contact.
"Case Details" is where you also enter the "GRANTEE/SUB-GRANTEE INFORMATION." Click the "Sub-Grantee" dropdown arrow and select the Grantee/Sub-Grantee Organization for which you are taking the application. In most cases, there will only be one value and it will display by default.

Click on the "Grant" dropdown arrow and enter the Grant information. Here, too, there will usually only be one value, and the system will display it by default. Then click on the dropdown for Case Manager and select the Case Manager who is assigned to this case. Finally, enter in the "Application Date" the date on which you first began the application.

Once you have completed entering all required fields, you can either click “Save + Continue” to continue or “Save + Close” to save the entered information and close out of the case.
Whether you click “Save + Continue” or “Save + Close,” the following screen will appear, prompting you to “Confirm Case Creation”. If you click “NO” – the system will return you to the “Enter Case Details” to make any necessary changes.

[Image of the Confirm Case Creation screen]

**Note:** The system will alert you if any required information (asterisk*) was not entered.
If you click “YES” on the “Confirm Case Creation” notification – the system will move to the “Eligibility” page
**STEP 4:**
You’ve completed the “**Intake**” process and clicked “**YES**”. The system has now moved to the “**Eligibility**” section.

**Enter Case Details**

<table>
<thead>
<tr>
<th>Participant Summary</th>
<th>Characteristics</th>
<th>Other Enrollment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Participant Name</strong></td>
<td>Planet Saturn</td>
<td></td>
</tr>
<tr>
<td><strong>Participant ID</strong></td>
<td>CMS000000164</td>
<td></td>
</tr>
<tr>
<td><strong>Age</strong> 69</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Grant Number</strong></td>
<td>GR-ANTEE-ZG-RA-N-T2</td>
<td></td>
</tr>
</tbody>
</table>

**Eligibility**

- **Number in Family**: *
  
  Enter the total members in family including the participant.

- **Total Includable Family Income**: *
  - 12 month
  - 6 month

- **Application Start Date**: 12/23/2019

**Eligibility Determination Date**: *

- **Employment at Enrollment**: *
  - Unemployed

**Is Family Income At or Below 125% poverty level?**

**Applicant Certification**

- **Did the applicant sign the Applicant Certification?**: *
  - Yes
  - No
Complete all required information to determine Applicant’s eligibility for SCSEP. All fields are required to be completed in this section. Once **all** fields have been completed, click **“SAVE + CONTINUE.”**

**NOTE:** When you enter the includable income, the system will generate the **“125% of poverty level threshold amount”** which determines whether the income meets or exceeds the total family income requirement.
Depending on the eligibility information entered, GPMS will display one of two messages: **Green** if eligible or **Red** if ineligible.
STEP 5: INELIGIBLE

If you agree with the ineligible determination, click the “NO” button under “SCSEP Eligibility.” Additional fields under “Reasons for Ineligibility” will then appear. Complete all required fields and then click “SUBMIT.”

You may return to “Eligibility Determination” by clicking the “Previous” button to review, reverify, and if necessary correct any information that may result in a different eligibility determination. However, if the applicant remains ineligible, click “SUBMIT.”
Once the eligibility determination has been verified and you clicked “SUBMIT”, the following notification will appear. Click “YES” if you are ready to proceed.
After you click “**YES,**” the system will send a notification to the Supervisor alerting them to review and make the final determination. The Supervisor is required to review and make the final eligibility determination for each new case. The system will now move to the “Characteristics” page. There is rarely a need to complete these fields for ineligible applicant so just click the **SAVE + CLOSE** button.
After you click "Save + Close," the following page will display. The ineligible case is now waiting for the Supervisor to make the final determination and approval of the case.

**Planet Saturn**

<table>
<thead>
<tr>
<th>Summary</th>
<th>Assignments</th>
<th>Participant Required Actions</th>
<th>Training and Other Services</th>
<th>Participant History</th>
<th>Related Actions</th>
</tr>
</thead>
</table>

**Summary | Intake | Eligibility | Characteristics | Other Enrollment Information**

**Participant Summary**

- **Participant Name**: Winter Snow
- **Primary Phone**: 55
- **Email**: wintersnow@email.com

**Participant ID**: CMS000000170

**Age**: 55

**NOTE**: Eligibility Determination Approval is in progress.
**STEP 6**

**ELIGIBLE**

If eligible, "**Reasons for Eligibility**" will be listed. Click "**YES**" under "**SCSEP Eligibility**" then click "**SUBMIT**".

---

**Enter Case Details**

<table>
<thead>
<tr>
<th>Participant Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Name: Silver Maryland</td>
</tr>
<tr>
<td>Participant ID: CLJS00400010164</td>
</tr>
<tr>
<td>Status: Pending</td>
</tr>
<tr>
<td>State:</td>
</tr>
<tr>
<td>Enrollment ID: 184</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>System Eligibility Determination: Eligible</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reasons for Eligibility:</td>
</tr>
<tr>
<td>• The participant is Unemployed</td>
</tr>
<tr>
<td>• The participant’s income is at or below 125% Poverty Level</td>
</tr>
<tr>
<td>• The participant’s age is within the allowed range</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCSEP Eligible? *</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Yes</td>
</tr>
<tr>
<td>☐ No</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Comment</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

**PREVIOUS**
Clicking "YES," will generate a final eligibility approval notification to the Case Manager’s Supervisor. The Supervisor is required to review and make the final eligibility determination for each new case. Once "YES" is clicked, the system will move to the “Characteristics” page. The Case Manager may continue with the case creation process by completing the “Characteristics” section while waiting for the Supervisor’s approval.
CHARACTERISTICS
Step 7:

Once eligibility determination has been submitted to the Supervisor for approval, the "CHARACTERISTICS" may now be entered. Complete all required information (*asterisk*).

<table>
<thead>
<tr>
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<th>Characteristics</th>
<th>Other Enrollment Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant Name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Status: Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Eligibility Approval</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant Number</td>
<td></td>
<td></td>
</tr>
<tr>
<td>State</td>
<td></td>
<td></td>
</tr>
<tr>
<td>County</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Participant Information has been auto-populated, and a unique Participant ID has been created. Also, each section has a link, "Show Detailed Instructions." Click on the link to access instruction for completing each section.
Continue completing the characteristics page, including the other characteristics below the “Most In Need Waiver Factors.” The system will auto populate whether the individual is 75 or older.

**Most In Need Waiver Factors**

- Severe Disability
- Frail
- Old Enough but Not Receiving SS Title I
- Severely Limited Employment Prospects

- **75 or Older**
  - Yes

**Other Characteristics**

**Public Assistance**

- Receiving Temporary Assistance to Needy Families (TANF)?
- Receiving Supplemental Nutrition Assistance Program (SNAP)?
- Unemployment Compensation Eligible Status?
- Supplemental Security Income (SSI) / Social Security Disability Insurance (SSDI) Status
- Subsidized Housing?
- State or Local Welfare (General Assistance)?
- Other Public Assistance Recipient?

**Educational Attainment**

- Highest Education Level Completed
- No Educational Level Completed
Case Managers can use the “Eligibility Characteristics Comments” section to provide any additional information related to the characteristic section. When all information has been entered, Click “Save + Continue” to move to “Other Enrollment Information.”
There are a total of 13 barriers to employment, listed in two separate categories, that comprise the Most-in-Need measure:

a) Priority of Service has 8 barriers-
   1. Homeless or at risk of homelessness;
   2. Rural;
   3. Limited English proficiency (LEP) (also a waiver factor);
   4. Low literacy skills (also a waiver factor);
   5. Veteran (or qualified spouse);
   6. Disability;
   7. Failed to find employment after using WIOA Title I;
   8. Low-employment prospects.

The 8 priorities of service are recorded only at the time of enrollment and may not be updated, with the exception of LEP and Low Literacy which can be recorded after enrollment. Also, you can only get credit for LEP or low literacy in one category, not both. If a participant’s condition changes during enrollment, record new information in the “Eligibility Characteristics Comments” section on the “Characteristics” page.

b) Waiver Factors has 5 barriers-
   1. Severe disability;
   2. Frail;
   3. Old enough for SS retirement but not eligible to receive it;
   4. Severely limited employment prospects in an area of persistent unemployment;
   5. Age 75 and over.

** LEP and Low Literacy is also counted as Waiver Factors

Waiver factors may be entered whenever you become aware of them, and you will receive credit in the Most-in-Need measure for each program year in which a waiver factor is first entered or updated.
Step 8:
After clicking **“Save + Continue”** from the **“Characteristics”** page, the following **“Other Enrollment Information”** page will display. Complete all applicable sections for Co-enrollment and Interest Job Codes. You can select up to 3 Job Codes by using the dropdown arrow.

If none of the Co-enrollment categories apply, you can click **“None,”** which will auto-populate **“NO”** for each category. **Ensure that each section has been verified before using the “None” button.** Additional information can be noted in the **“Enrollment Comment”** section. Once you are done, click the **“COMPLETE”** button.
When intake is complete, the system will return you to the “SCSEP CASES” page. CONGRATULATIONS!!! YOU HAVE SUCCESSFULLY CREATED A PARTICIPANT CASE!!

To review a case or check on its status, click the “Participant Name” link.
The Case will remain in a “Pending Eligibility Approval” status until approved by the Supervisor.

This concludes Case Manager Preview Module 2, Segment A
Thank You