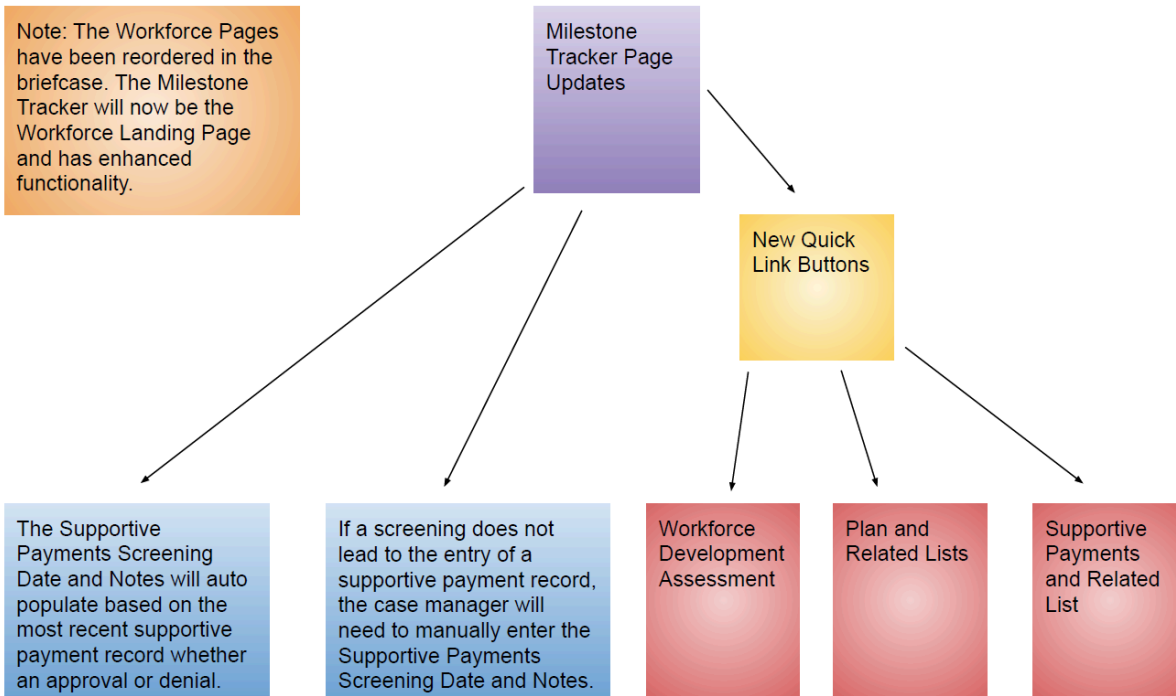




CBMS Project 9133: Milestone Tracker and Plan Updates Milestone Tracker Flow Chart

Note: The Workforce Pages have been reordered in the briefcase. The Milestone Tracker will now be the Workforce Landing Page and has enhanced functionality.





Milestone Tracker Landing Page and Reorganization

The Workforce Pages have been reordered in the briefcase to make it more convenient for case managers. Next, the Milestone Tracker will now be the landing page once entering the briefcase.





Milestone Tracker Updates

The Milestone Tracker defaults to show the workforce information based on client registration. If the client is registered for Employment First only, the tracker will default to the Employment First information.

The screenshot shows a web interface for the Milestone Tracker. At the top, there is a navigation bar with tabs: Milestone Tracker, Workforce Assessment, Plan, Supportive Payments, CCCAP, Work Program Summary, Work Program Eligibility, Re-engagement, Attendance, Work Program Appointment, Client Profile, Search Supportive Payments, and More. Below the navigation bar, there are two sections for "Program Type".

The first section, labeled "*Program Type", has radio buttons for "Workforce Development" (selected) and "Employment First". Below this are buttons for "Load", "Workforce Assessment", "Plan", and "Supportive Payments".

The second section, labeled "Detail", also has radio buttons for "Workforce Development" (selected) and "Employment First". It contains several input fields and dropdown menus:

- Workforce Screening Date:** 08/24/2023
- Workforce Screening Completed by:** Martinez, Rena R.
- Recent Workforce Assessment Date:** 02/12/2024
- Condition Agreement Date:** 09/19/2023
- *Signature Source Type:** Electronic (dropdown menu)
- Individualized Plan Date:** 05/10/2024
- *Signature Source Type:** Electronic (dropdown menu)
- Last Successful Contact with Client Date:** 06/10/2024
- *Type of Contact:** Phone Call (dropdown menu)
- Supportive Payments Screening Date:** 04/16/2024
- Supportive Payments Notes:** 4.16.24- Participant requested assistance with phone bill. CM [unclear]

There is a "Signed Condition Agreement" button next to the Condition Agreement Date field.

Supportive Payments Screening Date and Notes Updates

The Supportive Payments Screening Date and Notes will auto-populate based on the most recent supportive payment record whether an approval or denial. If a screening does not lead to the entry of a supportive payment record, the case manager will need to manually enter the Supportive Payments Screening Date and Notes.





Quick Links

The Milestone Tracker will include Quick Link buttons, allowing case managers to view and data enter information on linked pages without leaving the Milestone Tracker page. These buttons will link to the following pages:

Quick Link: Workforce Assessment Button

The screenshot shows the Milestone Tracker interface with a navigation bar at the top containing: Milestone Tracker, Workforce Assessment, Plan, Supportive Payments, CCCAP, Work Program Summary, Work Program Eligibility, Re-engagement, Attendance, Work Program Appointment, and More. Below the navigation bar, there are radio buttons for Program Type (Workforce Development selected, Employment First) and buttons for Load, Workforce Assessment (highlighted with a red box), Plan, and Supportive Payments. A detail section on the left shows Workforce Screening Date (08/24/2023) and Condition Agreement Date (09/19/2023). The Workforce Assessment pop-up window displays a table with the following data:

What is your overall Stress level right now?	Request Assessment Due Date	Assessment Completed Date	
3	08/12/2024	02/12/2024	⌵ ⌵ ⌵
3	02/12/2024	09/19/2023	⌵ ⌵ ⌵

Buttons at the bottom of the pop-up include Mark Released, Complete, and Find Workforce Assessment. A detail view below the table shows Request Assessment Due Date (02/12/2024) and Assessment Completed Date (02/12/2024), along with the question: What is your overall stress level right now? (FILL IN A CIRCLE).





Quick Links (Continued)

Quick Link: Plan and Related List

The screenshot shows a navigation menu with 'Plan' highlighted. Below it, a 'Workforce Development Plan' modal is open, containing a 'Condition Agreement' section with various input fields and text areas for user input.

Quick Link: Supportive Payments and Related List

The screenshot shows the 'Supportive Payments' button highlighted. The modal window displays search filters and a table with columns: Work Program, County, Type, Begin Date, End Date, Amount, and a button to 'Authorize Supportive Payments'.





Character Limits:

Character limits for the following fields have been increased on the Milestone Tracker page:

- The character limit for the ‘My Story’ field will increase to 1,500
- The character limit for the ‘Participant Responsibilities/My Next Steps’ field will increase to 2,000

***Plan Start Date**

Extension Plan Indicator

Yes No

Worker

Client's Email

English as a Second Language (ESL)

Yes No

My Story

Strengths and skills: Handworker, responsible.
Challenges: Injury that has impacted me both physically and mentally.

117 / 1500

Long Term Goals / My Life Goals

To be able to retire. See my kids grow up to be successful.

59 / 1000

Short Term Goals / My Short Objective

Recover from my injury.

23 / 1000

Participant Responsibilities / My Next Steps

Attend medical appointment as scheduled. Continue attending physical therapy as scheduled.
I will complete an average of 30 hours per week per calendar month by participating in the activities listed on my Road map to do list. I will record all my hours on my monthly work

604 / 2000

