# Introduction to FACS (Career Offices)

Workforce Solutions uses the Financial Aid Communication System (FACS) to communicate information on a pending or processed financial aid application.

## *When to use FACS*

Career Offices

To communicate information to the Call Center on behalf of a customer

*Examples of Appropriate Communication: Career office to Call Center*

- A customer needs to request a child care action (e.g., card order, suspension, withdrawal, 4-week seeking).
- A customer is inquiring about the status of their case.
  - Note: please reference the weekly funding alert to advise customer of number of days to expect to wait until contact.

*Examples of Inappropriate Communication: Career office to Call Center*

- To request to "mark ship" (this will be reviewed during processing of the weekly report).
- To request "need now" (this will be reviewed during processing the weekly report).
  - Exception: if the "need now" request is urgent, submit a FACS issue.
- Requesting expedited eligibility for a customer who will be placed on the registry due to lack of available funds; there are no funds and can't be expedited.
- Customer reports that she wants help selecting a training provider. Assist her by visiting the Statewide Training database. Document your efforts in TWIST.
- A parent wants to use a listed provider. Mail her the "Listed Providers" packet.

Financial Aid Payment Office (FAPO)

Call centers will alert FAPO of issues related to billing using FAMS instead of FACS.

*Examples of Appropriate Communication: Call Center to FAPO*

1. Provider phoned stating that she has not received payment.
2. You have a question regarding the Statewide Training provider system. Tuition is not listed.

*Examples of Inappropriate Communication: Call Center to FAPO*

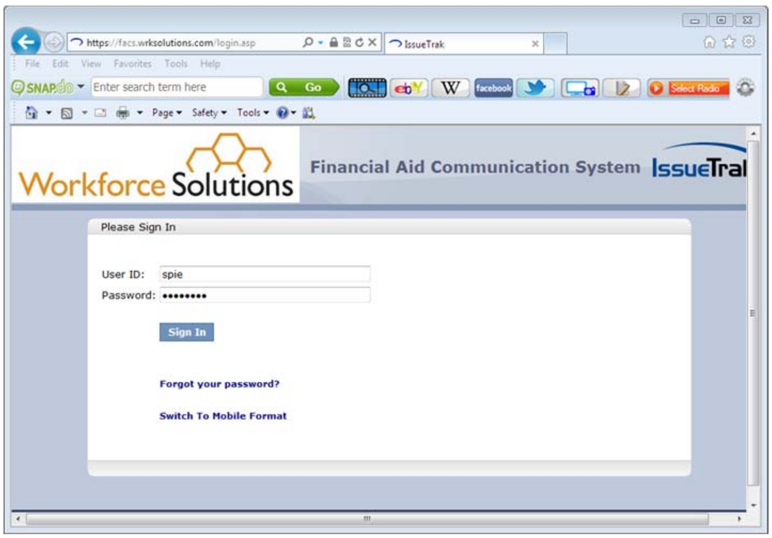
1. A customer phoned to request a new CCAA card. The call center handles that function.
2. A parent wants to use a listed provider. Mail customer the listed providers packet.

## *Prior to using FACS*

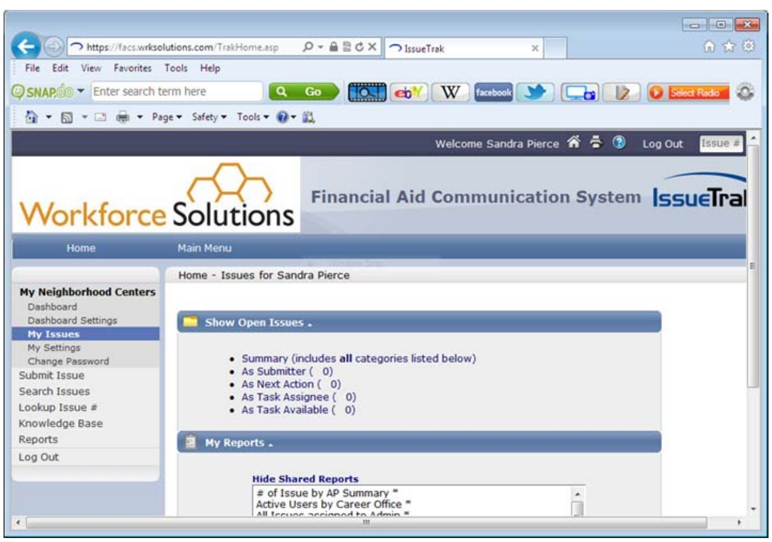
1. Read TWIST to determine if the MIS system has the information you need. (e.g., Services, Counselor Notes, etc.)
2. Check to see if a customer's application was received or to check the status of an application.
3. Access FAMS to determine if a customer's voucher is ready for printing.

## *Using FACS*

Log on FACS ([https://facs.wrksolutions.com/login.asp](https://facs.wrksolutions.com/login.asp)) by entering your user ID and password and clicking the "Sign In" button.




The following screen will appear:

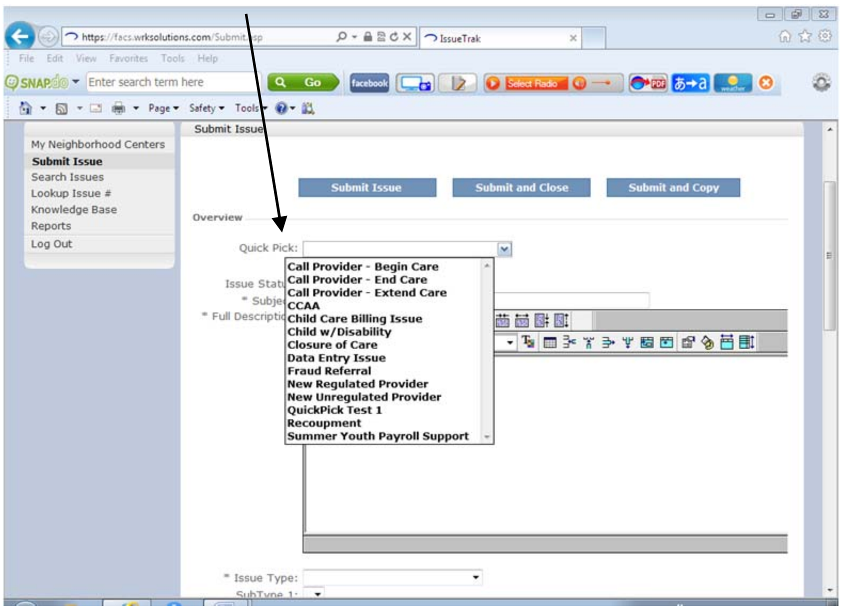


This is your main screen (homepage) in the FACS system. From this screen you can do the following:

1. Submit an Issue
2. Look up an Issue by Issue Number, or access the "Search for an Issue" page
3. Respond to a Next Action
4. Run reports

## Submitting an Issue

1. Click "Submit Issue" link in the left-hand navigation panel.
2. Select the "Quick Pick" dropdown to locate the appropriate identifier that explains what you want to communicate FAPO, the Call Center or the Career Office. Pictured are some available identifiers.

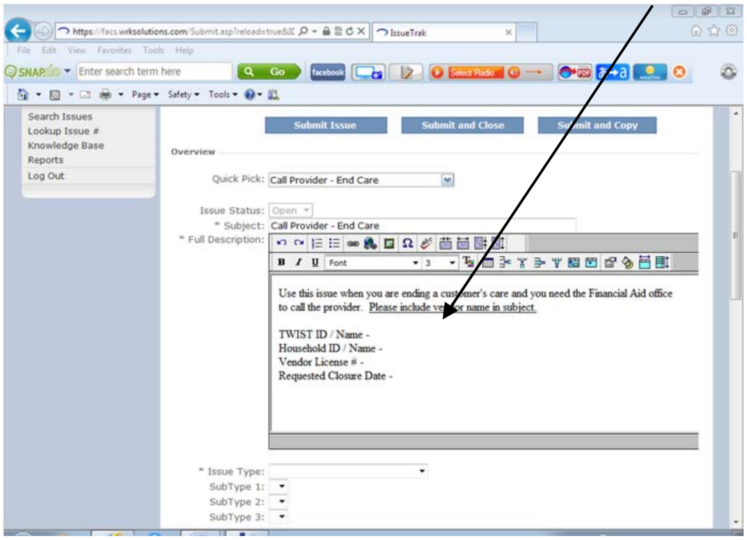



*Example*

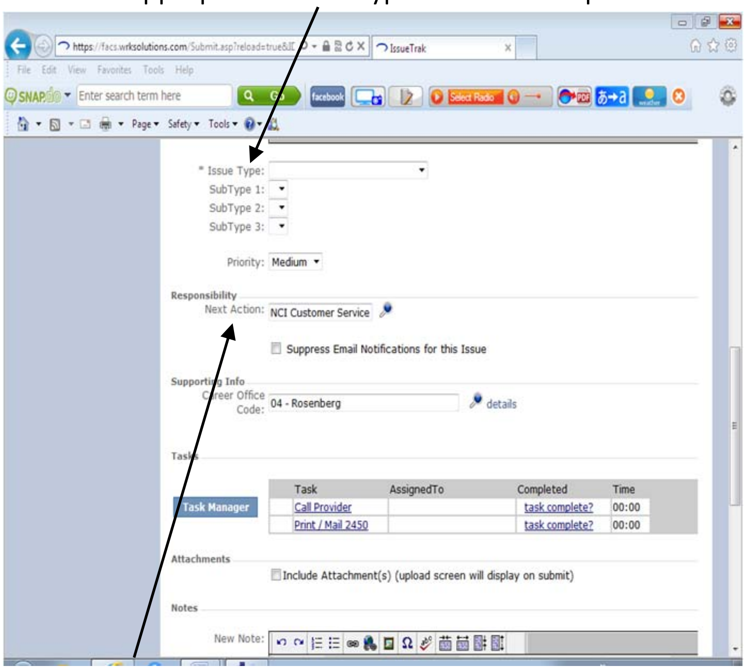
The parent came to the Career Office to request your assistance in stopping care for one of her children.

1. Log into FACS
2. Click on "Submit an Issue" in the left-hand navigation panel.

3. Select “Call Provider – End Care” from the Quick Pick dropdown. The screen will refresh with necessary information populated in the body of your message that is particular to your selection.



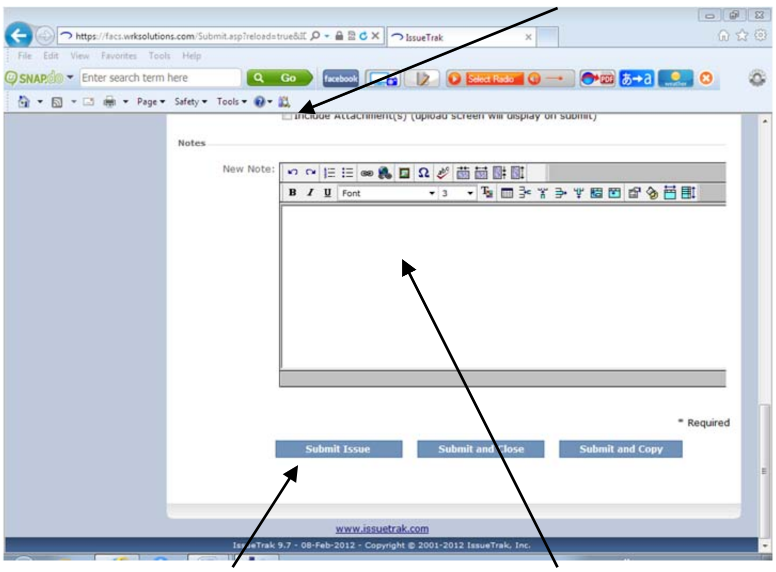

4. Provide requested data noted in the body of the email. In this example:
   *- TWIST ID*
   *- Household ID (enter the name of the child whose child care will end)*
   *- Vendor License Number (on the referral Screen)*
   *- Requested Closure Date (the date the parent told you she want care to end)*
5. Select the appropriate “Issue Type” from the dropdown. This helps to narrow down the Issue.



5. In the “Next Action” field enter the entity or person that you want to receive the communication.

| *Description of Issue* | *Select from the dropdown* |
|---|---|
| New Applications | ResCare Call Center |
| Pending Applications | To the representative assigned to the case in **DocuWare** or the **Call Center** representative assigned to your Career Office<br>**Vicky**- Texas City, Baytown, Liberty and Lake Jackson<br>**Carolyn**- Rosenberg, Bay City, Katy Mills and Wharton |
| Billing Issues | Accounts Payable |

6. To include any attachments, check the “Include attachment(s)” checkbox. Follow prompts.




7. Enter additional relevant comments in the “Notes” section.
8. Click the “Submit Issue” button at the bottom of the screen.

# FACS: Reports and Saved Searches

## Reports

Don't worry about Summary Reports.

On the Main Menu (homepage) you will notice a long list of reports in the "My Reports" window. Many of these reports do not concern Call Centers (CC) or Career Offices (CO) as they were developed specifically to be used in FAPO. Most users will typically see only reports that have deliberately been marked as "shared" since most users cannot create their own reports. Below is a list of CC and CO relevant reports, and their description:

| *Report Name* | *Description* |
|---|---|
| Active Users by Career Office* | Active Users by Career Office |
| All Issues assigned to Admin* | All Issues assigned to Admin: Only Admin can be 'assigned' issues. When issues come in via e-mail they usually are assigned to Admin. Therefore check this report regularly. |
| All Unassigned Issues * | This report shows all unassigned Issues (issues not *assigned*) but that may have been Next Actioned. |
| Issues created last month by Issue Type* | Shows issues created/submitted in the last calendar month regardless of status. |
| Issues open for more than 7 days: By Next Action* | Shows only "open" issues which have aging more than 7 days (i.e., will not show more recent issues). Sorted by Issue Type, Career Office, then Subject |
| Issue Search by User (S) | Lists Issues by 'Assigned to' user. These will be either blank or assigned to Admin. |
| Open Issues submitted to Admin* | Issues assigned to Admin which are still Open. |
| Sample Open Issues by Issue Type* | Open Issues grouped by Issue Type showing Priority, Issue Number, Subject and Status. A count of Issues is displayed with each Issue Type value as well as the entire Report. The details are sorted by Priority in ascending order. This report is shared with Everyone. |
| Sample Open Issues by Priority* | Open Issues grouped by Priority showing Issue Number, Subject, Issue Type and Status. A count of Issues is displayed with each Priority value as well as the entire Report. The details are sorted by Issue Number in descending order. This report is shared with Everyone. |
| | |

(S) = Saved Search
* = Shared

## Saved Searches

It is possible to save a search that you tend to run more than once. These are called “Saved Searches” and there are at least two ways to access them: from the “Reports” link in the left-hand navigation of your homepage (then click on “Saved Searches”), or from the “Search Issues” link in the left-hand navigation of your homepage (then click on “Save new Search” at the bottom-right of the Search page).

For example, if you typically want to search for all new issues submitted “last week” and Next Actioned to “Accounts Payable,” you may want to simply save this search’s criteria in a Saved Search and call it from the list next time.

## Quick Picks

“Quick Picks” are issue templates you create for commonly addressed issues. They allow you to pre-define appropriate information and values for those issues, such as the Subject, Description, Issue Type, Subtype, Priority, Email Distribution List, Attachments, etc. They also allow you to pre-define the necessary workflows involved, such as the Assigned To, Next Action, Tasks, etc.

We strongly recommend using Quick Picks as often as possible. While users may still change or add information as they submit a Quick Pick, its base template helps ensure the same kind of issue—no matter which user submits it or which agent works it—generally has the same or similar values and processes in place. Each Quick Pick is also a valuable time-saver, reducing the input required from users, as well as much of the inaccurate or inconsistent input that must be updated by your agents.

## Tasks

The “Tasks” feature in Quick Picks allows us to set up discrete actions and/or a consistent workflow required for resolution of an issue. Tasks may be added during the submission of an issue or at any time in the issue life cycle: manually and/or automatically. All tasks must be completed, cancelled or removed before an issue can be closed.

According to the Task Type assigned, the Task can be marked "complete" by clicking “task complete,” or can be approved or disapproved by clicking “yes” or “no.” A popup window is generated during completion of a Task. In this scenario, the user completing the Task will be prompted to enter Labor Hours and Labor Notes related to the completion of the Task. The system will always record who completed the Task as well as the date and time it was completed.

Dependencies may also be established among Tasks, e.g. Task 3 cannot be completed until Tasks 1 and 2 have been completed. FAPO currently does not have this feature activated, but if we decided to use this feature the links to complete subsequent Tasks would not appear until the preceding Task has been completed and the dependent task is available for completion.

# FACS: Substatuses of Issues

The "Status" of an issue is either Open or Closed. "Substatuses" allow you to organize issues into more concise sub-categories within Open and Closed. This helps you quickly identify to what extent issues have been addressed and where they are in the resolution process.

Through "Substatus Rules" you can have the system automatically update issues to a different Substatus when certain events occur. Below is a list of each possible substatuses and a description of each.

| *Substatus* | *Description* |
|---|---|
| -Blank- | Automatically set when an issue is closed |
| Pending | Automatically set when an issue is entered and the status is initially "open." It also gets set to this substatus when the issue is assigned. |
| Working | Automatically set either when there is an "Add Note" event or a "Next Action" event to a status |
| On hold | -not currently in use- |
| Response Received | Automatically set when the event is "Note Added by Submitter" |