Objectives

By the end of the training course all FACS users should be able to:
- Log into FACS
- Navigate the system
- Run existing/shared reports from the homepage
- Identify when to submit a FACS Issue
- Work issues
Objectives: Managers/Supervisors

- Managers and Supervisors will also be able to:
  - View and utilize the FACS Dashboard
  - Run existing reports, such as: Unassigned Issues, Not Actioned/Assigned Issues, Pending Issues over seven days
  - Create new reports and Saved Searches to monitor their staff

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Financial Aid Communication System (FACS)

Who uses FACS?
- Career Offices
- Call Centers
- Financial Aid Payment Office (FAPO)

Purpose: Replace e-mailing/faxing of forms
- tracks communication regarding pending or processed financial aid applications in a centralized manner

Examples:
- Career Offices communicate to Call Centers such things as changes in household.
- Call Centers communicate with FAPO regarding billing issues.
- Career Office communicates an action to Call Center that something needs to be done in the Financial Aid Management System (FAMS) (e.g., “Mark Ship,” “Need Now”).

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Types of FACS Issues

Current list of Issue Types
- 24 Hour Priority Request
- Can’t Complete Referral
- Case Status inquiry
- Change CC Vendor Request
- Child Care Action
- Child Care Billing Issue
- Child w/Disability
- Confiscate attendance card

Data Entry Issue
- Fraud Referral
- Immediate Priority Request
- Mark Ship Request
- Need Now Request
- Recoupment
- Referral Fix
- TAA High Priority
- Vendor POS Malfunction
Definitions

-Submitter
-Assigned to
-Next Action
-Group
-Issue Types
-Quick Picks
-Tasks
-Status: Closed/Open
-Reports
-Saved Search

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Dos and Don’ts (Career Offices)

Do use FACS when:
- Requesting CCAA Cards, withdrawals, suspensions, four-week seekings, etc.

Don’t use FACS when:
- Requesting mark ship. This will be cleared during weekly review of reports.
- Requesting “need now.” This is cleared during weekly review of reports. However, if expedited service is needed, please submit via FACS.
- Requesting eligibility to be processed for scholarships. Funding is not available. If customer will be placed on the registry, priority service is not needed.
- Checking case status. Please view weekly Funding Alert for screening time frame. However, if it is outside of the reported time frame for a case to be screened, or if priority service is requested, submit a FACS issue.

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Accessing FACS

- Login: [http://facs.issuetrak.com/Login.asp](http://facs.issuetrak.com/Login.asp)
- Forgot password?
  - Enter user ID
  - Click “Forgot your password?” link
  - An e-mail will be sent to your work address to reset password
- **Homepage** – Three Important Areas:
  - Navigation pane (left of page)
  - “Show Open Issues” (top of page)
  - “My Reports” (bottom of page)
User’s name

Check on issues you submitted

Check on issues that have been sent to you to resolve

Navigation Pane
To Submit an Issue

- Select “Submit an Issue”
- Choose Quick Pick from dropdown (refer to Issue Types chart to select appropriate Issue Template)
- Follow instructions in body
- Select “Issue Type” (Usually same as Quick Pick)
- Make sure “Next Action” field is populated
  - Quick Picks usually have a default group selected
  - If field is blank, Issue will show up on the “unassigned/not next actioned” weekly report
- Check “Include Attachments” check box if necessary
- Click “Submit Issue” button
- Include attachments/necessary documentation in pop-up window (only if “Include Attachments” check box was checked)

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To Work an Issue

- From Homepage, select “Next Action to me”
- Sort Issues on next screen
- Select an Issue to work
- Read description
- Check attachments (they have information necessary for you to complete the issue)
- Follow tasks and mark each completed as you go
- Close the issue

If you can’t close an issue or complete an action:
- Click “Next Action” in navigation pane, enter note and enter a name or a Group in the “Next Action Field” to send the issue back for more information or to take some other action. Click “Update” button.
To Search for an Issue

- Select “Search Issues” from Navigation panel
- Enter search criteria
- Click “Search” button at top of page.
  - You can also save a detailed search as a “Saved Search” for repeated use.
  - Your “Saved Searches” will appear in the bottom portion of your homepage.
Other features

- Look up Issue by Issue #
- Miscellaneous actions on issues:
  - Add Notes – You can add notes or comments to an issue, even after it has been closed.
  - Edit – You can change the data on an issue. Use this if you are going to work the issue.
  - E-mail – You can escalate an issue by e-mailing a copy directly to another FACs user, and can be added to issue as a Note.
  - Close – This should be done by the person who completed the last task for the issue, or by the person who created it.
Running Shared Reports and Saved Searches

- Select any of the reports listed in “My Reports” section
- Click “Run Report” button
- Description of report is at top of the page
- Subjects are hyperlinked to each issue
Questions and Answers

- Materials augmenting today’s training (including charts and PowerPoint) will be sent to all managers via e-mail. They can disseminate information to you.
- If you have future questions, please send them to me at: Joseph.Chauncey@wrksolutions.com
Managers and Supervisors

- View and utilize the FACS Dashboard
- Run existing reports, such as: Unassigned Issues, Not Actioned/Assigned Issues, and Pending Issues over seven days
  - Reports can be exported to Excel
- Create new reports and Saved Searches for monitoring purposes
Sample: Dashboard

![Dashboard Image]

Financial Aid Communication System

Open Issues by Priority

- High: 201
- Medium: 367
- Low: 2

Open Issues by Issue Type

- 24 Hour Priority Request: 50
- Bill Services: 51
- Can't Complete Referral: 1
- Case Status Inquiry: 15
- CCAA Issue: 12
- Change Vendor Information: 2
- Change Vendor Service Details: 1
- Child Care Action: 10

System Overview

- Open Issues: 572
- Assigned Issues: 73
- Unassigned Issues: 499
- Issues Escalated: 9

Open Issues by Organization

- Houston Works: 3
- Interfaith of The Woodlands: 105
- NCI: 244
- Neighborhood Centers, Inc.: 201
- ResCare: 7

Current Qtr Performance

- Issues Opened: Apr 1422, May 1433, Jun 622
- Issues Reopened: Apr 1, May 2, Jun 8
- Issues Closed: Apr 1692, May 1188, Jun 948
- Avg Resolution Time: Apr 1085.36, May 69.23, Jun 250.32

Times are formatted as hh:mm

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Reports and Saved Searches

- Both Reports and Saved Searches are at the bottom of the homepage
  - New Saved Searches can be created by any user from the “Search Issues” page.
  - Administrator can create Saved Searches to be shared with other users.
Questions and Answers

- Materials augmenting today’s training (including charts and PowerPoint) will be sent to all managers via e-mail. They can disseminate information to you.
- If you have future questions, please send them to me at: Joseph.Chauncey@wrksolutions.com

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