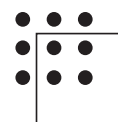
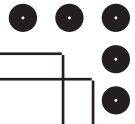

USING THE FINANCIAL AID COMMUNICATION SYSTEM



NATIONAL WORKFORCE INSTITUTE



INTRODUCTION

The Financial Aid Communication System (FACS) is a web-based software program used to communicate changes and other information about a customer's financial aid application. FACS is used by the Call Center, FAPO and the Career Offices to:

- Update the progress of a customer's financial aid application,
- Notify the Call Center of changes to a customer's financial aid needs or eligibility criteria,
- Notify the Career Office of eligibility approval/denial,
- Notify the Financial Aid Payment Office (FAPO) of child care billing Issues,
- Notify the Call Center of a customer's need for a new voucher,
- Request the Call Center set up Training Accounts, etc.

Glossary

Communicating in FACS requires an understanding of its unique terminology. Reference the glossary below for explanations of various terms.

Closed Issue - An Issue that has been worked and resolved.

Group - A collection of users or other groups.

Issue - A ticket for action needed to be taken.

Issue Types - Categories of commonly used Issues.

Next Action - Select the user or group who should take action on the Issue. Items are referred to as "Next Actioned" to a person or group.

Open Issue - An Issue that requires an action.

Quick Pick - A shortcut to create a new Issue. It applies predetermined settings that may include, Status, Issue Type, Next Actioned to, Subject, Body Content, etc. Quick Picks should be selected first whenever available to save time and ensure necessary fields are not overlooked.

Saved Search - A function in FACS that allows you to save search criteria you use frequently.

Status - An Issue is either Open and requires an action, or Closed and is complete.

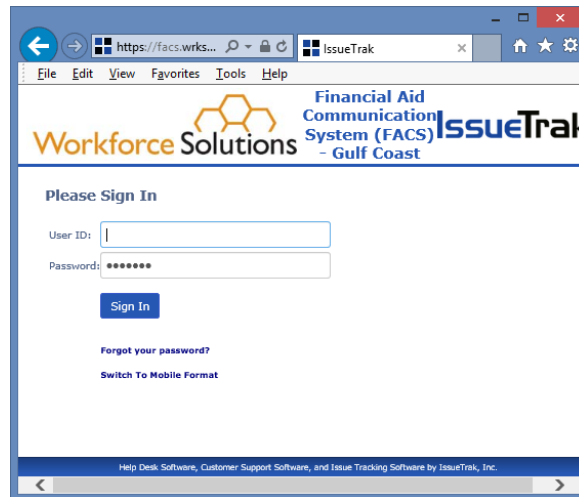
Submitter - The user who creates/submits an Issue.

Substatus - The status of an issue is either Open or Closed. A Status may also have a Substatus which allows 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.

- *Blank*: Automatically set when an issue is closed.
- *Pending*: Automatically set when an issue is entered and the status is initially "open." It also converts 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."

Log In

To login to the FACS system go to: <https://facs.wrksolutions.com/>. The logon screen displays.

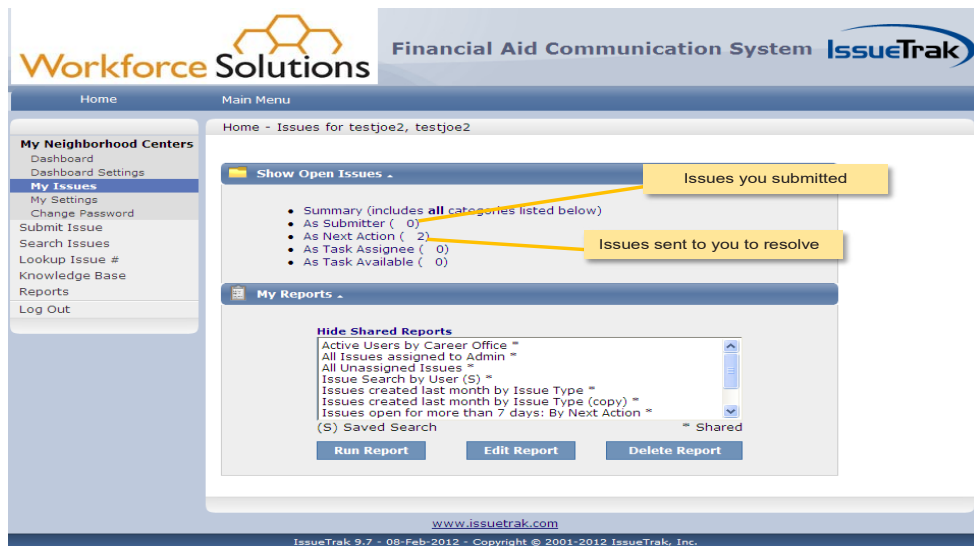


Enter your user ID and password. Passwords are case sensitive, must be a minimum of six characters, and include both letters and numbers. You will be locked out of the system after five failed attempts. If you forget your password, enter your User ID, click the "Forgot your password?" link, and follow the instructions.

Passwords expire every 90 days. You can change your password any time by clicking the "Change Password" link in the left navigation bar.

Home Page

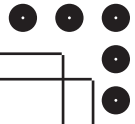
Your FACS home page defaults to the My Issues page. If you prefer, you can contact the system administrator at the Financial Aid Payment Office (FAPO) to set it to the Dashboard. To navigate to this page while logged in, select My Issues or Dashboard from the navigation menu on the left.



Use the left navigation bar to access different pages. Keep track of Issues for which you are responsible for under the “Show Open Issues” section on the My Issues page. The “As Submitter” link displays a list of all Issues you’ve submitted and the “As Next Action” link displays a list of Issues that have been assigned to you, or a group you’re a part of, to resolve.

Important Note: Check the “As Next Action” link frequently so Issues can be resolved timely.

Below the “Show Open Issues” section the My Reports section displays a list of shared reports and available saved searches.



SUBMIT AN ISSUE

Quick Picks

Commonly addressed Issues are set up in FACS as Quick Picks. A Quick Pick is a template that automatically populates information and values for those issues, such as:

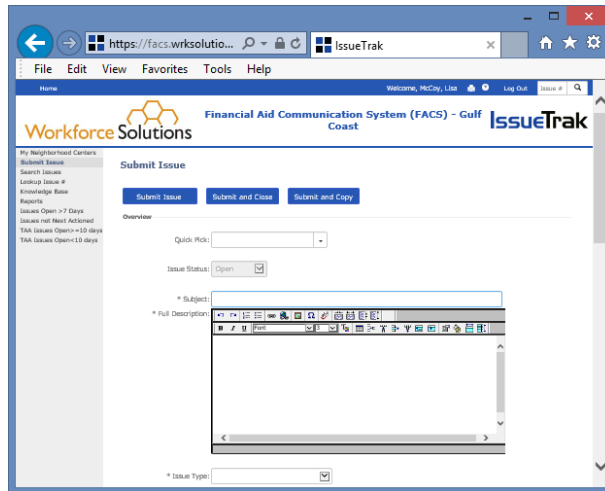
- Subject
- Description
- Issue Type
- Subtype, Priority
- Email Distribution List, etc.

Quick Picks also pre-define the workflows such as Assigned To, Next Action, Tasks, etc.

Use Quick Picks whenever possible. You can still change or add information as you submit a Quick Pick, but the base template helps ensure similar issues have the same or similar values and processes in place regardless of who submits or works it. Quick Picks are also a valuable time-saver, reducing the input and update time required.

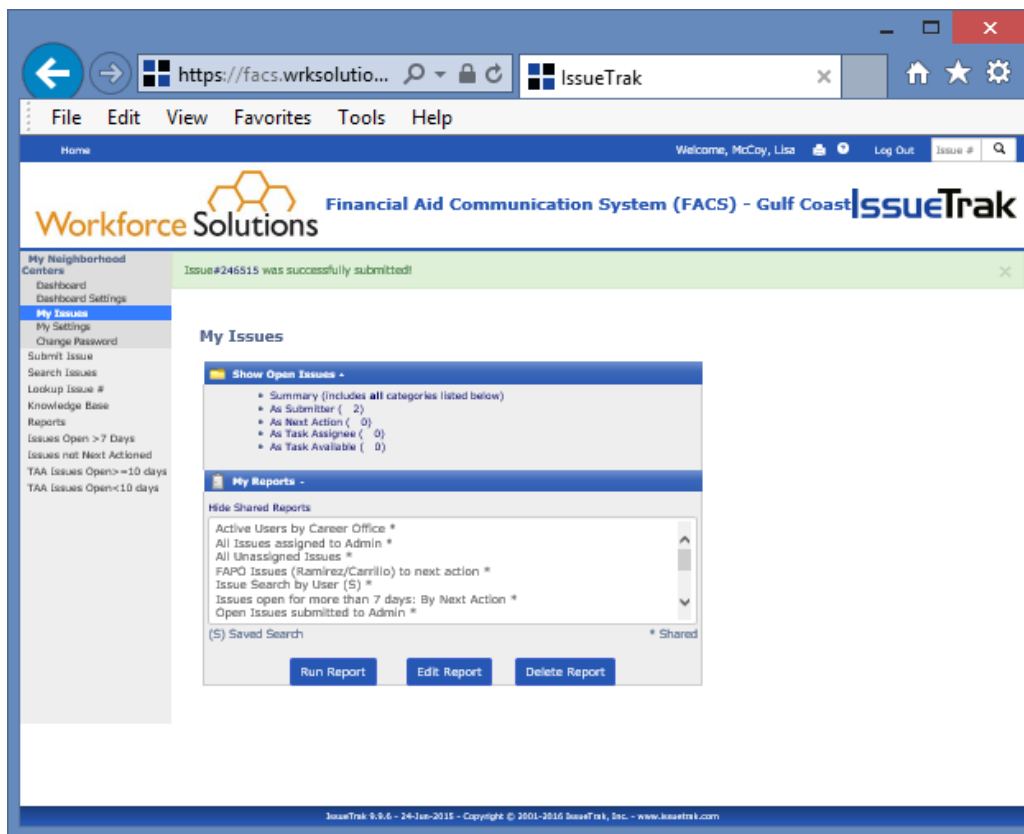
To create a new Issue using a Quick Pick:

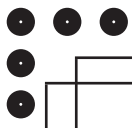
1. Select Submit an Issue from the left navigation bar. The Submit page displays.



2. Select the appropriate action from the Quick Pick dropdown menu. (Refer to the Issue Types chart at the end of this section to select the appropriate Issue Template.)
 - The Subject line automatically populates.
 - The Full Description field populates with prompts for the information required for the Issue.
 - Add the information requested in the Full Description field.
 - The Issue Type automatically populates. Do not change the type.
 - In the Next Action field, select the individual or group responsible for taking the next action on the Issue. Quick Picks are typically assigned to a default group. For example, New Vendor Creation is assigned to the Funds Analysts. Assign the Next Action to a group instead of an individual whenever possible – this ensures the Issue is worked by whoever is available. If the Next Action field is left blank:
 - No one will know who should take action on the Issue, and
 - The issue will sit in limbo, and appear on the “Unassigned/Not Next-Actioned weekly report.
 - Add the Career Office. In the career office field, begin typing the name of the career office, the full name and number will display for you to select. You can also click the magnifying glass to the right of the Career Office field for a pop-up list of all options.
 - Click on the Include Attachments check box if you have documents to submit which support the Issue. You will be asked to select the attachments after the next step.

- Add a New Note to include any additional information that might help the person or group complete the actions needed, if necessary.
 - Complete the fields for:
 - Customer First Name
 - Customer Last Name
 - TWIST ID
3. Click Submit Issue. If Include Attachments is checked you will be prompted to upload the documents. Refer to the Attach Documents to an Issue section below to add attachments. The new issue will be assigned the next available issue number, the My Issues page displays with “Issue (Issue#) was successfully submitted” at the top of the page.





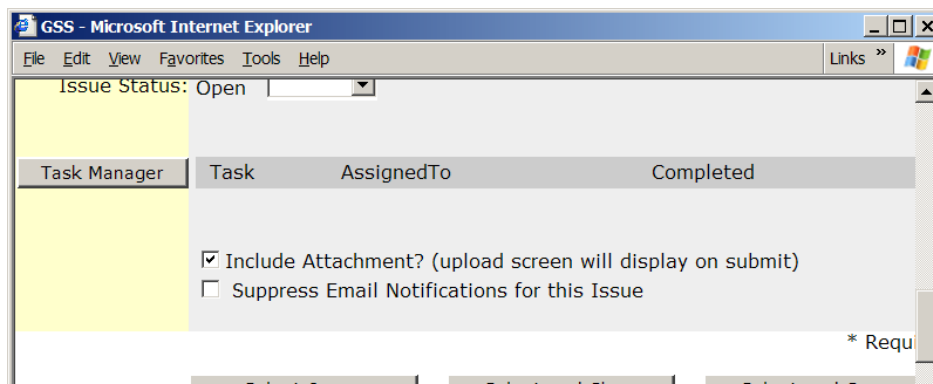
NOTES

ATTACH A DOCUMENT TO AN ISSUE

Documents supporting an Issue may be attached, if needed. Documents must be created and saved before you can attach them to an Issue.

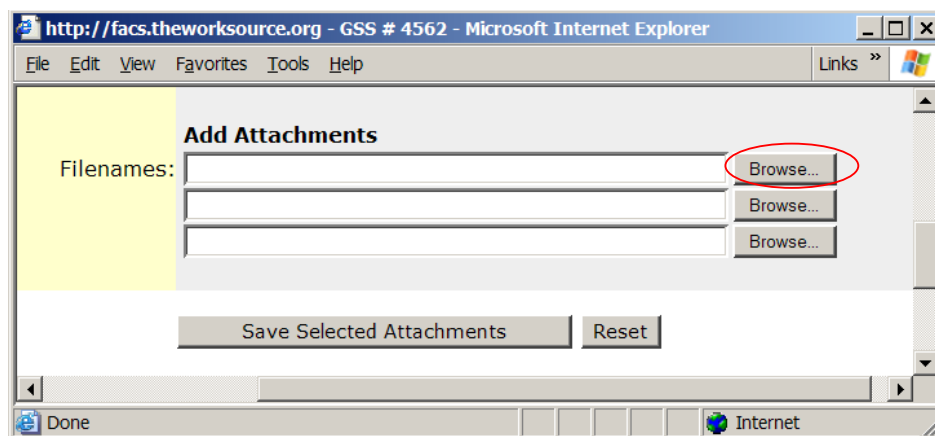
Create the Issue and check the Include Attachment check box.

Click Submit Issue.



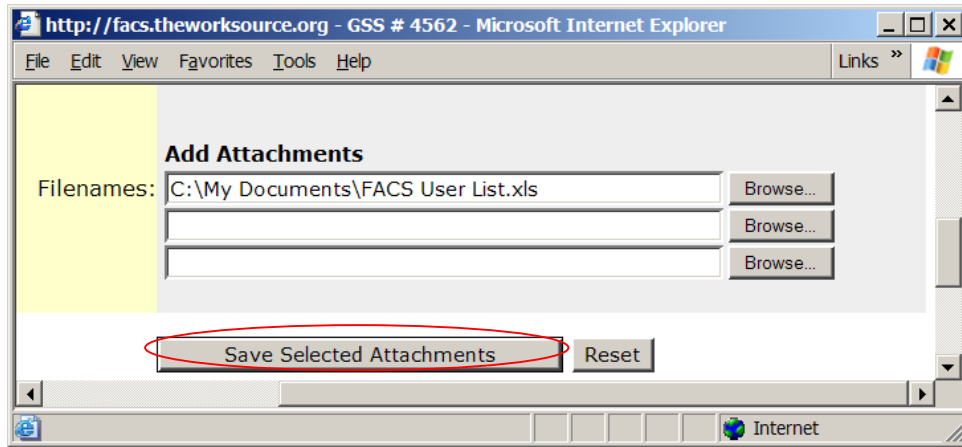
The attachments pop-up displays.

Click the Browse button to the right of the Filename field. Locate the file you wish to attach and click Open.



The Attachments window displays with the path to the document in the Filenames field. Repeat until all documents are selected.

Click on Save Selected Attachments.



SEARCH FOR AN ISSUE

You can search for Issues using a variety of information in the Issue including, but not limited to:

- Issue Status
- Issue Type
- Subject
- Submitted By
- Assigned To
- Next Action
- Dates


To search for a specific Issue or set of Issues:

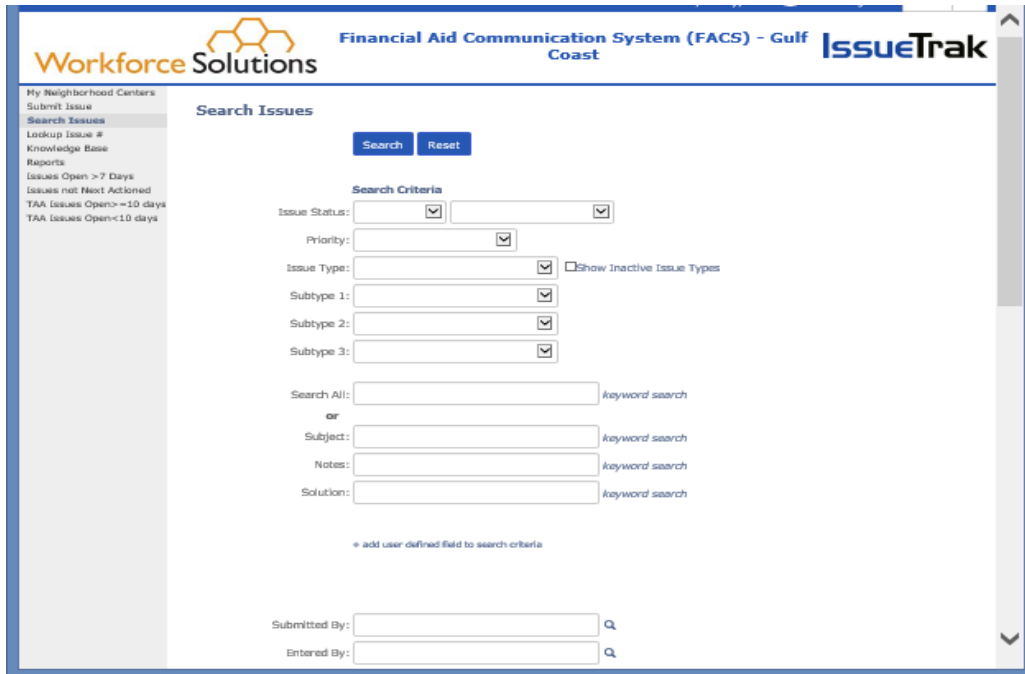
1. From the Home Page, click Search Issues from the left navigation bar. The Search Issues screen displays.

The screenshot shows the 'Search Issues' interface in a web browser. The browser's address bar displays the URL 'https://facs.wrksolutions.com/Issue/'. The page header features the 'Workforce Solutions' logo and the text 'Financial Aid Communication System (FACS) - Gulf Coast IssueTrak'. On the left side, a navigation menu is visible with 'Search Issues' highlighted. The main content area is titled 'Search Issues' and includes a 'Search' button and a 'Reset' button. Below these buttons, there is a 'Search Criteria' section with several dropdown menus for 'Issue Status', 'Priority', 'Issue Type', 'Subtype 1', 'Subtype 2', and 'Subtype 3'. There is also a checkbox labeled 'Show Inactive Issue Types'. Below the dropdowns, there are search fields for 'Search All:', 'Subject:', and 'Notes:', each with a 'keyword search' label. A 'Solutions' field is partially visible at the bottom of the search criteria section.

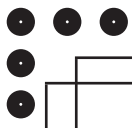
2. Complete the fields for the Issue(s) you wish to find. For example:
 - Status: Open/Closed.
 - Issue Type: A specific Issue type. See Issue Type List at the end of this section. Note: This field combined with the "Date Opened" field is the most common type of search.
 - Search All: Use this as a keyword search to locate Issues with specific text in the Issue's Subject, Description, Notes, or Solution. Search for Issues related to a specific customer by entering the customer's TWIST ID in the text field.
 - Submitted By: To locate Issues submitted by a particular person.
 - Next Action By: To locate Issues currently Next Actioned to a specific person or group.
 - Organization: To search by contractor.
 - Career Office: To search by office.
 - Date Opened/Closed: To search for Issues created or completed within a specific time frame.
3. Select the Search Output Options: Define how you want to receive the search results.
 - a. Search Title: Name your search. (Choose a name which accurately defines your report.)
 - b. Output: Select the format you want the results to display. Options include Count Only and Detailed Output to Excel.
 - c. Sort Order 1-3: Select the way to have the results organized. For example, you can choose to have results ordered first by Assigned To, then Required by Date, to return a list of Issues for staff responsible and the dates the actions are due.
 - d. Save New Search (Optional): If you wish to have the option to run this search at a later time select the Save New Search button to the right.
 - e. Retrieve Saved Searches: Click this button to run a search previously saved.

- Click Search. The search results displays in the form you identified in step 3b.

Important Note: Fields with the magnifying glass icon to the right of them require a system search to populate the field. Click on the  to select from options for these fields.



The screenshot shows the 'Search Issues' page in the Workforce Solutions FACS - Gulf Coast IssueTrak system. The page has a blue header with the logos for Workforce Solutions, Financial Aid Communication System (FACS) - Gulf Coast, and IssueTrak. On the left, there is a navigation menu with options like 'My Neighborhood Centers', 'Submit Issue', 'Search Issues', 'Lookup Issue #', 'Knowledge Base', 'Reports', and several filters for issue status and age. The main content area is titled 'Search Issues' and contains a 'Search' button and a 'Reset' button. Below these are the 'Search Criteria' fields: 'Issue Status' (two dropdown menus), 'Priority' (dropdown), 'Issue Type' (dropdown with a 'Show Inactive Issue Types' checkbox), and three 'Subtype' dropdowns. There are four search input fields: 'Search All:', 'Subject:', 'Notes:', and 'Solution:', each with a 'keyword search' label and a magnifying glass icon. Below these is a link to 'add user defined field to search criteria'. At the bottom, there are 'Submitted By:' and 'Entered By:' fields, each with a magnifying glass icon.

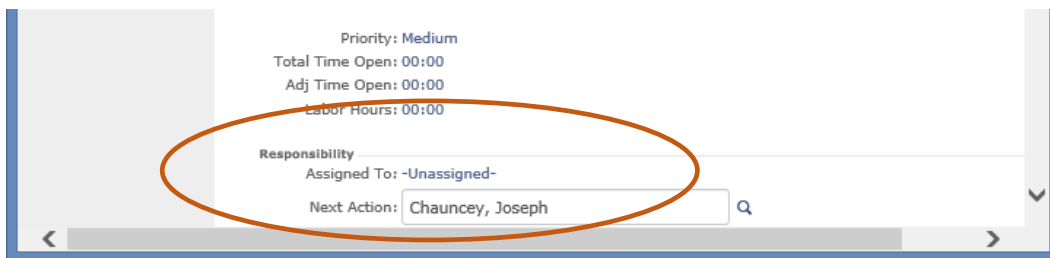


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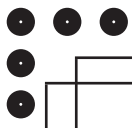
CHANGE NEXT ACTION

Occasionally Issues will be assigned to the wrong person or group. To change to whom an Issue is assigned:

1. With the Issue selected, click on Next Action from the left navigation bar. In the Next Action field, begin typing the name of the person or group, a list of names displays in a dropdown. Make your selection.
2. Click Update.



The screenshot displays a user interface for managing an issue. The issue details shown are: Priority: Medium, Total Time Open: 00:00, Adj Time Open: 00:00, and Labor Hours: 00:00. Below these details is a 'Responsibility' section with an 'Assigned To' dropdown menu currently set to '-Unassigned-'. The 'Next Action' field is active, showing a search input with 'Chauncey, Joseph' entered and a magnifying glass icon to its right. A red oval highlights the 'Assigned To' dropdown and the 'Next Action' field.



NOTES

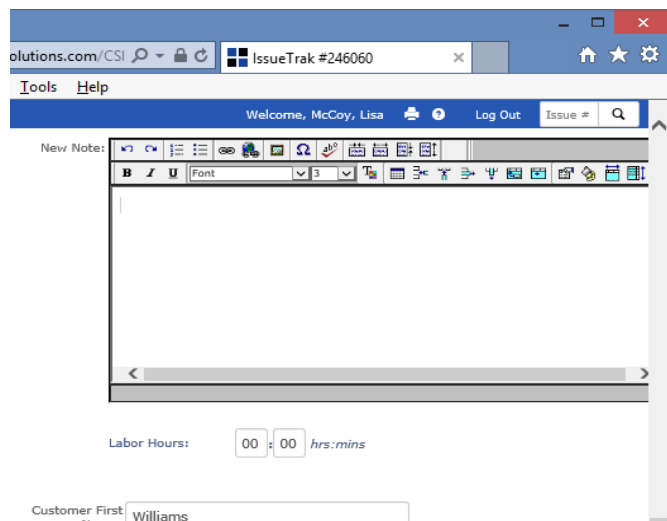
RESOLVING ISSUES

An open Issue requires action on the part of the person to whom it's Next Actioned. Once the resolution has occurred, the responsibility for the Issue returns to the original submitter. Occasionally, some action must happen or question(s) must be answered before an Issue can be resolved. Use FACS to get questions answered, change or add attachments, or get manager approval.

Questions

Use the Issue to ask or answer questions regarding the requested action by adding a note.

1. With the Issue open, click Add Note on the Issue or on the left navigation bar. The New Note field displays.
2. Type in your question or the answer to the question.

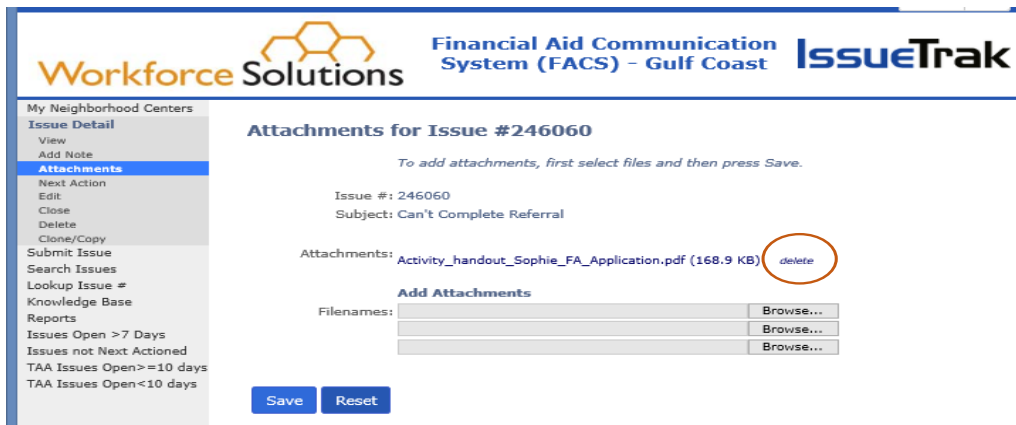


3. Click Add Note at the top or bottom of the page.
4. Send the Issue back to the appropriate staff by changing who is responsible for the Next Action.

Changing an Attachment

To make edits to an attachment on an Issue and/or change an attachment:

1. With the Issue open, click Attachments on the left navigation bar. The Attachments screen displays.



2. Click on the document name to open the attachment. Make the necessary changes and save the document to your computer.
3. Close the document. The FACS Attachment screen displays.
4. Delete the original document from the Issue by clicking Delete to the right of the Attachment field.
5. Add the edited document by clicking Browse and selecting the document from your files. Add additional documents, as necessary.
6. Click Save.
7. Change the person responsible for the Next Action to the appropriate staff.

Request Approval

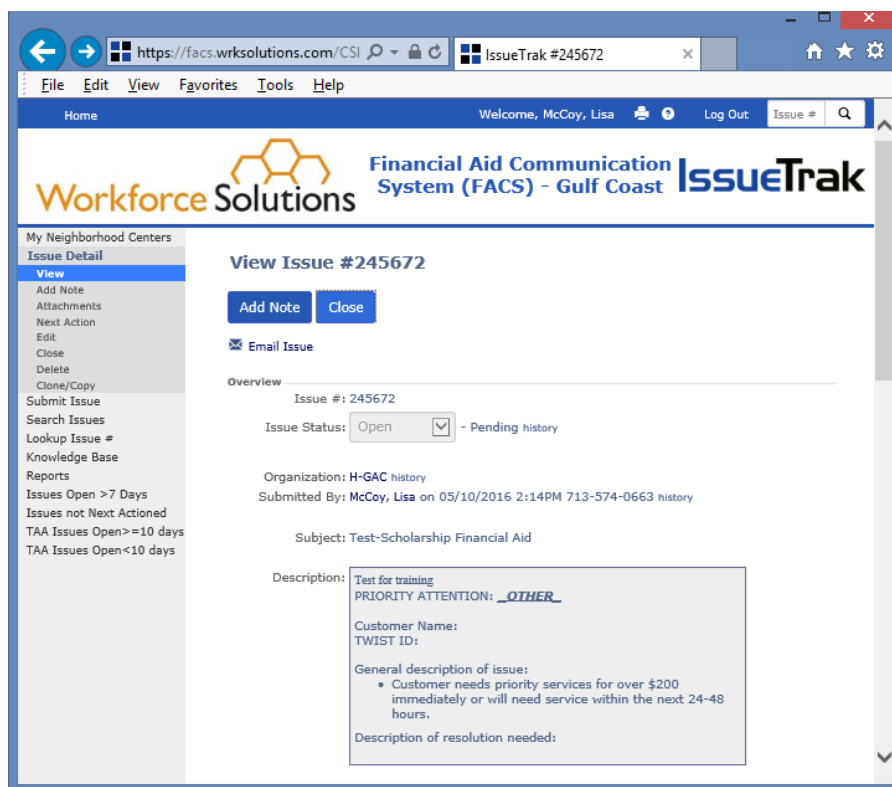
If the person who submitted the Issue does not have authority to request an action, send the Issue to someone who can approve it by changing the person assigned the Next Action.

CLOSE AN ISSUE

Once an Issue has been resolved it may be closed or “Next-Actioned” to the person who initially submitted it to notify them of the resolution(s) and alert them to close the Issue. Check with your supervisor to determine the process for your office. Issues should be closed in a timely manner once resolved. Issues for which a user has been identified as the next person to take action will be displayed on the As Next Actioned link on the home page.

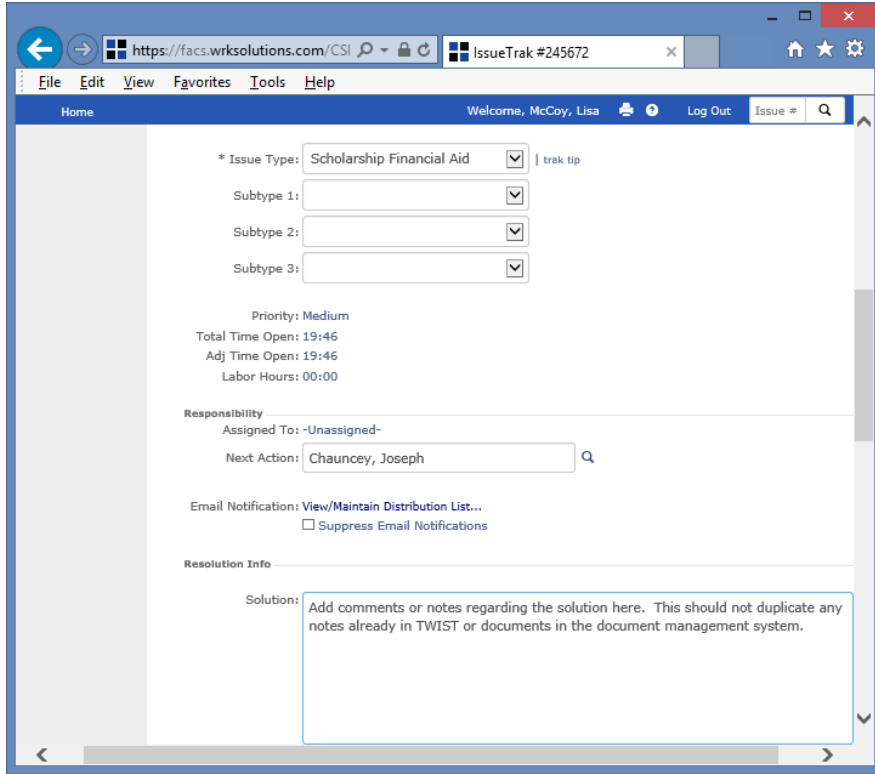
To close an Issue:

1. With the Issue open click on the Close button on the top of the screen or select Close from the left navigation bar.

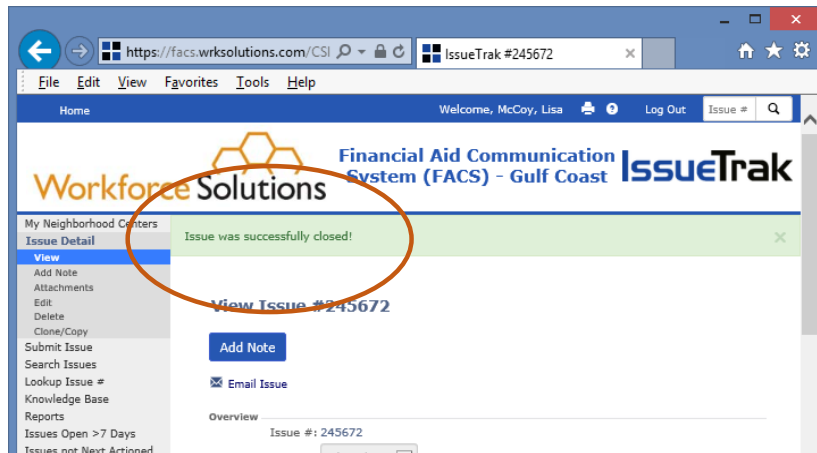


The Solutions field displays. Add notes regarding what you did to resolve the Issue. Don't duplicate notes in TWIST.

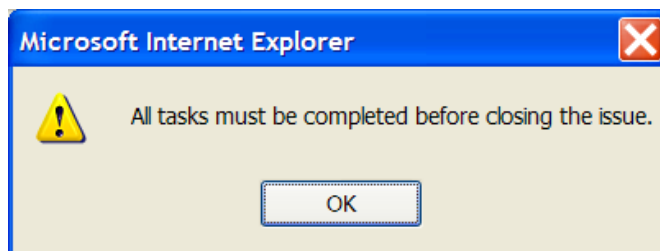
2. Scroll to the top or bottom of the screen and click Close Issue.



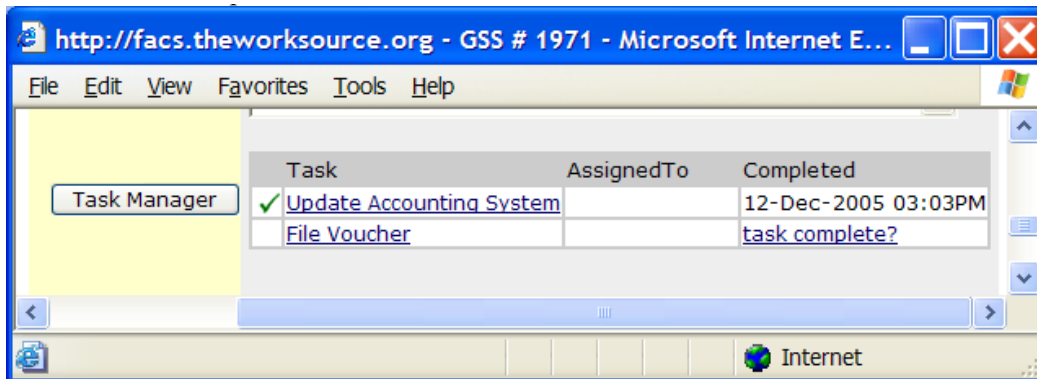
The closed Issue verification displays.



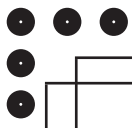
If there are Tasks on the Issue which need to be completed a pop-up message will display.



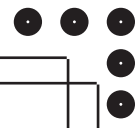
- a. Click OK. The Close Issue page displays.
- b. In the Task Manager section of the page click the "task complete?" link for all tasks not completed.



- c. Click the Close Issue button.



NOTES

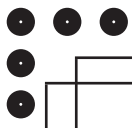


REPORTS AND SAVED SEARCHES

The reports relevant to your work will display on your Home/My Issues page. Some of the reports you may use are:

Report Name	Description
Active Users by Career Office*	Active Users by Career Office
All Unassigned Issues *	This report shows all Issues not assigned. They may have been Next Actioned.
Issues created last month by Issue Type*	Shows issues created/submitted in the last calendar month regardless of status ordered by Issue Type.
Issues open for more than 7 days: By Next Action*	Shows “open” issues which have are older than 7 days, sorted by Issue Type, Career Office, and then Subject.
Issue Search by User(s)	Lists Issues by ‘Assigned to’ user.
Sample Open Issues by Issue Type*	Open Issues grouped by Issue Type showing Priority, Issue Number, Subject and Status. It includes a count of Issues by Issue Type value and for the overall report. The details are sorted by Priority in ascending order. This is a shared report.
Sample Open Issues by Priority*	List of open Issues sorted by Priority which displays the Issue Number, Subject, Issue Type and Status. It includes a count of Issues by Priority and for the overall report. The details are sorted by Issue Number in descending order. This is a shared report.

* = Shared



NOTES

Access Saved Searches

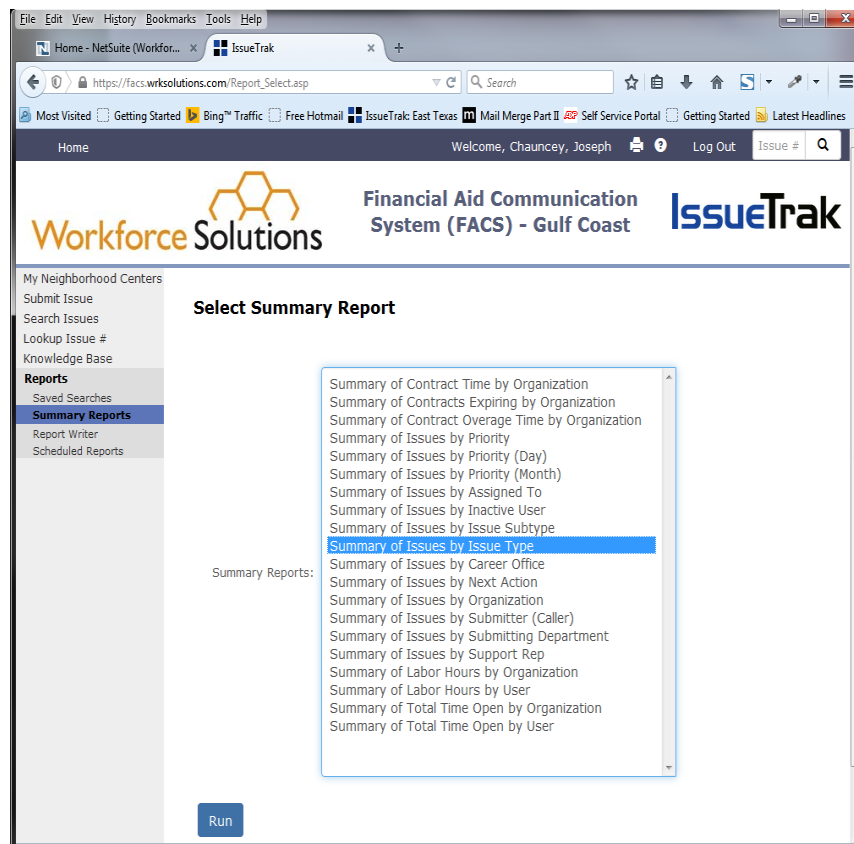
On the My Issues page under the My Reports header, saved searches are indicated with an (S).

1. Click the Hide Shared Reports link under the My Reports bar.
2. Your saved searches display.

Run a Report

To run a report:

1. Select Reports from the left navigation bar. The Summary Report screen displays. Select the report you wish to run. Note: This example shows the Summary of Issues by Issue Type report.
2. Click Run.



Workforce Solutions Financial Aid

- The report parameters page displays. Select your date from the dropdown to choose a range such as: This week, Last Month, Last Year, etc., which will automatically populate the start and end dates. Or manually set the date range you wish to view.
- Click Show Report.

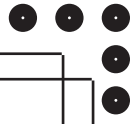
The screenshot shows the 'Issues by Issue Type - Select Date Range' page. The page title is 'Issues by Issue Type - Select Date Range'. The date range is set to 'Last Month', with start and end dates of 11/01/2014 and 11/30/2014. The sort order is 'Issue Type'. There are 'Show Report' and 'Reset' buttons. The left sidebar contains navigation links for 'My Neighborhood Centers', 'Reports', and 'Report Writer'.

The report displays. Use the links on the Reports page to view more detail.

The report displays. Use the links on the Reports page to view more detail.

The screenshot shows the 'Issues by Issue Type - Results' page. The table displays the number of issues recorded from 11/01/2014 to 11/30/2014, categorized by issue type and status.

Issue Type	Opened Before 11/01/2014	Opened In Period	Closed In Period	Left Open On 11/30/2014
4 Week Seeking	0	1	0	1
Authorize Care/ Add a Child	0	2	0	2
Bill Services	89	123	102	110
Billing Inquiry	6	0	3	3
Can't Complete Referral	1	0	1	0
CCAA Issue	0	2	0	2
Child Care Billing Issue	28	25	27	26
Child Care Priority	14	22	28	8
Child w/Disability	4	2	1	5
Closure of Care	28	24	82	59
Customer Waiting in Office-	0	28	27	1
Immediate Need	23	7	9	21
Data Entry Issue	25	35	31	29
E-mailed Referral	1	1	0	2
General Question- (Formerly)	0	2	1	1



DO'S AND DON'TS WHEN USING FACS

Do

Use FACS to:

- Request withdrawals, suspensions, four-week seeking, etc.
- Request a new voucher.
- Request a new vendor creation, or a fund source change.
- Check the status of an applications ONLY if it is outside the time frame for a case to be screened according to the weekly Funding Alert, or if priority service is requested.
- Check your Home Page - "Next Actioned to Me" link frequently.
- Close out Issues you submitted which have been resolved. Select the Quick Pick which applies to a message, whenever possible. This will ensure the Issue is submitted correctly.
- Complete the appropriate Issue Type and Next Action fields if you don't use a Quick Pick template.
- Ensure Child Care related Issues are assigned to "NCI Customer Service."
- Ensure voucher, payment request, and cash substitute Issues are sent to "Funds Analysts." .
- Request any payment related issues through a Career Office manager or Designee.

Don't

Use FACS to:

- Request eligibility to be processed for scholarships if funding is not available. If the customer will be placed on the registry, priority service is not needed.
- Check case status. Refer to the weekly Funding Alert for screening time frame.
- Effect reports by changing the Next Action field or Issue Type on Quick Picks.

Manager/Supervisors

Use the "Search Issues" page to:

- Confirm Issues assigned to your staff are being worked.
- Ensure Issues are completed correctly.

Note: Occasionally the "Next Action" field will be left blank, which prevents it from being sent to the appropriate team. Filter Issues by Career Office and Next Action for a list of Issues assigned to your office which are not 'Next Actioned' to someone.

See Search for Issue for more information.