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MAYOR

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To: All WorkSource Centers and Satellites

From: Manuel Chavez, Acting Director  
Workforce Development Division

Subject: **DIRECTIVE NUMBER: 05-07**  
**INFORMATION AND GUIDELINES FOR USE OF NEW INTEGRATED  
SERVICES INFORMATION SYSTEM (ISIS) CASE MANAGEMENT  
COMPONENTS**

On October 29, 2004, as part of our commitment to continuous quality improvement, the Workforce Development Division released the ISIS Case Management System for Adults and Dislocated Workers. The new case management system includes on-line case notes and forms for the Individual Employment Plan (IEP), On-the-Job Training (OJT) Agreements, Individual Training Accounts (ITA), and Work Experience, and is integrated with current ISIS MIS functions. Several new reports have been added to help manage your customer caseload.

### **Use of the ISIS Case Management Components**

We recognize that it will take time to get your staff familiar with the new case management components.

For any current customers in the system, there is **no requirement** that you enter existing case notes, IEP or other programmatic documents into the new system. However, any customer data or activities entered after November 1, 2004 must be entered and tracked via this version of ISIS.

### **ISIS MIS Data**

This latest version of ISIS retains all the current MIS functions, and customers should continue to be enrolled and tracked through this system.

All customer data that was previously stored in ISIS has been migrated to this latest version. The information is still accessed via staff ISIS user IDs and passwords.

## **Staff Access to New Case Management Functions**

For staff to access to the case management components, all case managers, job developers, business service representatives, and any other staff who will input case management data will need to have an active ISIS user ID and password. To receive a user ID, staff must attend both the MIS Forms Training and ISIS Training offered by the MIS Section on a monthly basis.

To enroll staff in these trainings, please contact Ruth Crandall via e-mail ([rcrandal@cdd.lacity.org](mailto:rcrandal@cdd.lacity.org)).

Additionally, we will be conducting several ISIS case management training sessions at specific Centers in November and December to familiarize staff on the case management system. A training bulletin will be released shortly specifying time and location for these sessions.

## **Existing Case Management Software**

A number of Centers are currently using case management software other than ISIS. For those currently using another system, the City's Information Technology Agency (ITA) will provide an information download to any Center who requests it. The information will be available in Excel.

The data export/download component has not been yet been incorporated into the ISIS System, but will be added soon. We will notify the System when it becomes available.

## **Case Files**

While the new ISIS case management components allow Centers to input and store customer data on line, hard copies of this information must still be kept in customer case files that are available for program review and audit purposes. The new case management components will allow you to print required forms, documents, and case notes.

## **Customer Confidentiality / Medical Records**

In order to ensure our customer's privacy, and comply with Federal confidentially regulations, **no medical information** should be entered into the ISIS case note system. If it is necessary to document a medical condition, this information should be maintained in a separate medical file in a secured location.

## **Acknowledgements**

These new case management components and ISIS improvements were developed by a diverse team that included the City's Information Technology Agency (ITA), the Community Development Department's Workforce Development Division (WDD), Computer Services Division (CSD), and numerous WorkSource Centers.

We would like to thank the following WorkSource Centers for their invaluable input on the new case management components:

- Canoga Park WorkSource Center
- Chatsworth-Northridge WorkSource Center
- Chinatown WorkSource Center
- Sun Valley WorkSource Center
- Van Nuys WorkSource Center
- Westlake WorkSource Center

If you have any questions or concerns, please contact your assigned MIS Analyst.

MC:GS