

# MINUTES

## CRYSTAL REPORT USER GROUP

**Meeting date:** January 23, 2009

**Location:** ETR Marlborough

**Attendees:** April Carvalho, Christina Kelley, Cholthanee Koerojna, Cynthia Krusen, Eddie Zhang, Gail Rossiter, Joe Verla, Kathy Hoffman, Kathy Mack, Kathy Wesley, Leslie Abramowitz, Linda Bass, Marie Meibaum, Matt Burke, Mike Doak, Mo Iorio, Steve Trueman, Tom Thatcher, Mary Chase, Linda Kent

**Recorder:** Christina Kelley/Eddie Zhang

### MOSES Updates

- The New MOSES build is scheduled for release on 2/9/09. New functionality has been implemented for exiting WIA Title I, Veterans, and Trade job seekers.
- The TEGL-17-05 was distributed on 2/2004 and stated if a participant doesn't get services for 90 days they become an exiter (exit date is last reportable service date (LRSD) and not scheduled for a future service). Currently not all career centers are following the TEGL-17-05 process for exiting. It will be required for the new fiscal year in FY2010.
- **Hard exits need to match soft exits.** A new field will be added to the basic tab in the programs section. It will show the "Last Reportable Service Date". When you click on the basic tab to exit a job seeker there will be a reminder that the exit should match the last reportable service date. The program exit date will no longer default to today's date it will now show the last reportable service date which will match the soft exit date.
- In the new build all reportable services (drop down lists) will be blue/bold so it will be clear which services will affect the 90-day clock. Based on the services entered the "Last Reportable Service Date" will update after the record is saved. Follow-up services do not restart the 90-day clock only federal reportable services.
- On the 90<sup>th</sup> day, the last date of the reportable service becomes the exit date.
- In the new build a new service result of *After Exit Follow-up* has been added to several service categories. This is not a reportable service so you can continue to deliver case management follow-up services without re-starting the 90-day clock.
- Services can be deleted and/or the service result can be changed if you make a mistake and it will update the LRSD to your change.

- To preview a list of federal reportable services use CS\_Service\_Codes.Dart\_Services\_Category, criteria: not null. The Dart\_Services\_Category field has a two-digit code (which groups the services into categories).
- The federal report will use the service date from the LRSD (starting in FY2010) rather than the transaction date, which is used in the OSCCAR.
- It's important to not let the 90 days go by without either entering an exit or posting a service (if services have been delivered).
- There will be a Crystal Report available to preview job seekers that have passed their 90 days of no reportable services but have not been exited from their program.

## Tech Talk

- Auto Complete Function: In the edit formula window hold Ctrl key down and press the Space Bar, it will show a list of functions. Double click or click enter to select a function from the list.
- Definition of specific fields in CS\_Service\_Codes table.
  - If "Approved\_Services field is 'Y' then the service will get counted on the OSCCAR Report.
  - Approved\_Category field (link to Codes\_2) tells you what category the service will be counted in on the OSCCAR.
  - If there is a number listed in the DART\_Service\_Category field then it is a federal reportable service and will show as blue/bold in the drop down service lists in MOSES.
  - If DART\_Service\_Level field is null, 'I', 'C', or 'T' then it is a core, intensive, or training service. The new veteran performance measures entered employment rate is weighted by the core intensive services.
- The new build will use the service date for all job placements (which is a federal reportable service) entered in the employment tab. The service date defaults to today's date so it is important the service date is updated to match the actual start date to ensure the service date will be correct. Discussed having the new build updated to pull the job placement date from the Support Services table, which appears on the General Services tab as Outcomes/Enhancement – Unsubsidized Employment that uses the start date as the service date. [It has subsequently been determined that using the Unsubsidized Employment service for this purpose will not work].

**BYORFS** – Design a report to show job seekers who have 90 or more days of no reportable services but have not been exited from the program.

- Applicant\_Main, CS\_Adhoc\_Title\_I\_Report, Applicant\_Cases (left join) in case there is no case manager assigned.

- Fields – Applicant\_ID, Customer Name (create formula), LRSD, Days since LRSD (create formula: DataDate –(Last\_Reportable\_Service)).
- Criteria:
  - Program ID as parameter field and selection criteria
    - 33 – Adult
    - 34 – Dislocated Worker
    - 35 – Youth
    - 18 – Trade
  - Service Delivery Area = 2
  - Program end date isnull
- Add **Case Manager (CM)** column from USERS\_V01 (which is not available at the demo which was linked to test database)
- Group by **CM**
  - Open/closed cases
  - Cross case managed
  - Multiple open cases
  - If case status = 1230 (Open), bring up CM names; or display ‘Closed’ (code 1231)
- Linda’s No Service in N Day Report demo:
  - Linda started with a disclaimer that this report is for users to contact job seekers if there is no service in N days; or it will be irrelevant.
  - Originally designed for Brockton for WIA data entry QC purpose
  - Parameter fields are WIA programs of Adult, Dislocated Workers, Youth and Trade
  - Details are elaborated (signature feature as always with Linda’s reports) in report description section
  - Linda also showed Service Type and Result Report, which gives user a glimpse of all services’ categories in term of their Fed/OSCARR approval status.
  - Makes Fed approved services Blue Bold
- Les made a list of LRSD reports to be developed
  - Hard Exits that don’t match LRSD report
  - Days since LRSD report
  - He encouraged everyone to submit suggestions for any other LRSD related reports that may help.
- Hard exits vs. soft exits match issue was raised and discussed. It’s generally agreed that for Fed report purpose, it should be fine as long as the two fall into the same quarter. But for data validation, the discrepancies can still be an issue.

**Next Meeting:**  
**Friday, March 13th**