

MINUTES

CRYSTAL REPORT USER GROUP

Meeting date: June 12, 2009

Location: ETR Marlborough

Attendees: April Carvalho, Bob Remeika, Joan Boucher, John Greene, John McCarthy, Kathy Hoffman, Leslie Abramowitz, Linda Bass, Marie Meibaum, Mike Doak, Mo Iorio, Tom Thatcher, Trish Steiblin.

Recorder: John Greene

<<Morning>>

Website /Product Updates

- .A new committee to look at new web port software to possibly replace Talent Quest and Job Quest.
- There were 3-Vendor software demos regarding possible replacement alternatives.
- Some discussion followed regarding the merits of replacing all or parts of Moses.
 - We own and maintain the Moses software.
 - We are free to add additions as we need them to meet business needs.
 - A replacement may not be as beneficial in the long term if it were to restrict our ability to meet changes in business needs.
 - More to follow.

MOSES Updates

- Discussion on the changes being implemented to the CCS and the mandatory attendance of selected UI recipients who have been permanently separated from their employment.
 - New Tabs and data elements have been added to Moses to aid in the identification of those folks who have been profiled and selected for mandatory participation.
 - Due to the potential for confusion Les Abramowitz has committed to document the procedures to be followed as they relate to Moses.
- Discussion followed on the ARRA Summer Youth program procedures.
 - Must enroll youth in Work Experience Activity.
 - Must set Work Readiness goals on the Youth Tab.
 - Goals must be set on or after enrollment in the Grant.
- All WIA Title I Adult and Dislocated Worker monthly reports and annual performance will include both ARRA and formula participants.
- Discussion of the new UI Datamart.

<<Additional Notes/Afternoon>>

Upgrade of Web Portals/Evaluation of MOSES

- DWD is evaluating new software for the web portals, i.e., Talent/JobQuest (renamed JobQuest), and will be doing a survey of the field to evaluate MOSES—whether people think it should be supplemented or replaced. It was suggested that questions from a survey used a few years ago could be asked again to see if there has been a change in users' evaluations of MOSES, especially since some areas have been addressed, e.g., speed has improved.
- There was a discussion on whether to supplement or replace MOSES, since Les was soliciting input. Issues that arose:
 - The potential loss of functionality if a standard application is purchased, e.g., GeoSolutions
 - The loss of local control over the application—the need to seek consensus with other states using the application; even though MA could do some customization, this could be complicated when upgrades/new patches are offered
 - The need to map from a different database (SQL Server) to Oracle if used as a supplementary application
 - A new application might end up looking like MOSES after a few years, in response to requests for tailoring to meet the needs of the diverse users currently tied to MOSES: WIBs, career centers, State, managers, line staff, employers, training providers, etc.
 - The potential loss of access to historical data with a new application
 - The disruption entailed in replacing MOSES, developing new procedures, training staff, etc.
 - Would these items be outweighed by the likely streamlining, i.e., the potentially more limited data entry and the potential ease of extracting/reporting on data?
 - DWD staff would potentially be freed up to spend time on projects other than Federal reports, since a new application would likely manage this more simply.
 - Maintaining MOSES is expensive.
 - MOSES is not web-based.
- Contractors are currently working on JobQuest to add functionality so that employers can upload their job orders directly; probably to upgrade the resume functionality, and to do some general cleanup.

ARRA Hires

- It was pointed out that career centers/WIBs can (and should!) enter the information on new ARRA hires (summer youth staff, etc.) directly in MOSES, without going to the EOLWD website devoted to this purpose. These would be entered as job orders that were immediately closed due to being filled.

ARRA Wagner-Peyser and Re-Employment Services

- **Auto Enrollment.** Build 28 will incorporate the auto-enrollment feature for ARRA Wagner-Peyser and RES based on:
 - Attendance at a Career Center Seminar (CCS) and
 - Participation in an initial assessment interview (service type = 466; service result = 609) within one week of the CCS Attended service date. The assessment could be offered on the same date or on a separate date. Using the separate date would allow center staff to gauge the level of commitment of the customer.
- **July RES Process**
 - Starting June 13, 300 UI Profilees will receive letters of notification that they must attend a CCS, if they have not attended in the past 180 days, sometime within the following five weeks. If they do not attend, after three weeks, they will receive a reminder letter. These customers will appear as both "notified" and "selected" (potentially sanctioned for nonattendance) in MOSES.
 - Starting July 13, only the UI Profilees will be auto-enrolled in RES and ARRA W-P, based on the attendance in the CCS and assessment activity.
- **September RES Process (no set date yet; probably September or October)**
 - 2500 permanently separated UI Claimants will be notified that attendance is mandatory, and of these 300 will be UI Profilees "selected" for potential sanctions if they do not attend. They will be coded in MOSES as "notified" and "selected" AND will be identifiable by their enrollment in the UI Profiling program (program code = 6).
 - The remaining 2200 will only be coded as "notified" and will not appear in the UI Profiling program.
 - All 2500 will have an CS_Applicant_Main field "UI First Payment" date field populated as well as any additional permanently separated customers received in the weekly file. This field will thus distinguish all permanently separated customers.
 - In September (or when we implement full RES), all customers notified (2500) will be auto-enrolled in RES and W-P if they attended the CCS and the initial assessment interview within one week of the CCS.

- **RES in General:**

- Other UI Claimants (walk-ins) who meet the RES criteria, but were not notified, may be manually enrolled in RES and ARRA W-P. However, RES is intended for UI Claimants only, so other CCS attendees should not be enrolled in RES.
- The CCS Scheduling screen currently has a "trigger" of 21 days, but this will be changed to five weeks in the next build (July 13).
- The 300 UI Profilees who are selected (and potentially subject to sanctions if they do not attend) are claimants who have been determined as not having attended a CCS in the last 180 days.
- Note: Currently the specification for auto-enrollment does not include customers who attend an initial assessment interview via events. Joan will make sure this is fixed.
- The UI First Payment date field is populated for the permanently separated UI Claimant population. This field is populated weekly on Saturday, so that reports on Sunday would incorporate the previous week's data.

RES Customer Action Plan

- The Customer Action Plan (CAP) will be entered by going into the Special Programs tab->RES (a new tab). Goals should be entered here via a dropdown list that Alice Sweeney/Alex Lawn are developing. Please contact them to provide input on what you think should be included.
- The goals description area (memo field) on the RES tab is also mandatory for some reason, and there was speculation that there might be a minimum of 10 characters required. This field will be reportable also.
- It is unclear at this time whether there will need to be a recorded outcome for each goal.
- Note that the goal screen must be filled out separately for each goal.
- Apparently the goals are the only aspect of the CAP expected to be entered into MOSES.
- Note also that the RES CAP does not replace the need to use the case management system for customers who enter a program that requires case management, e.g., ARRA WIA Title I programs.

ARRA Summer Youth

- Les previewed a summer youth report in order to demonstrate two new fields in the AdHoc Title I Report table: work_experience_start_date and work_readiness_set_date. The work experience start date field is automatically populated when a youth is enrolled in a summer youth course with a work experience activity.

- For each summer youth, a [work readiness] goal must be set (and later completed) in the Youth Goals tab, and there MUST be a work readiness goal entered. The goals will appear in the CS_Applicant_Goals table.
- **Important note:** Summer Youth Worksites MUST be added to the training course-youth worksites screen BEFORE youth are enrolled in the course or else the location/worksites dropdown list will be permanently grayed out and unavailable when you later go into the youth's individual record->course activity->training enrollment detail->location/worksites to enroll the youth in the specific worksite. Fixing this would entail deleting enrollments, entering the worksite info, and then re-enrolling the youth.
- It is possible to enroll summer youth in a work experience courses/worksites within the two weeks prior to the work experience start date, if this makes data entry easier. However, if youth do not actually appear for work, the entries would have to be deleted.
- Course approvals for summer youth work experiences (and in Metro North, special projects), should use "Specific Funding"->"ARRA Summer Youth", with approval dates of 5/1/09 – 9/30/09.

Federal Reporting

- For the purposes of federal reports, regular (formula) WIA and ARRA WIA grants will be treated as a unified whole for performance purposes, e.g., whether formula or ARRA, all dislocated workers will contribute to dislocated worker performance measures. Therefore, ad hoc reports attempting to analyze performance should use both formula and ARRA grant codes. Canned reports in MOSES will be changed to reflect this approach.
- The monthly federal reports include one for both formula and ARRA WIA Adults, Dislocated Workers, and ARRA NEGs; one for ARRA Youth (both Summer and year-round); and one for Wagner-Peyser/RES (both ARRA and regular W-P).
- ARRA Wagner-Peyser and RES enrollees will also appear in the Ad Hoc Title I table, but currently this is not working correctly.

UI Claimant Datamart

- By 6/26 or sooner, the datamart (a view) will be available. It will be refreshed weekly.
- The datamart will include UI Claimants, NOT MOSES registrants, so that the Applicant_ID field will be null in many cases. Therefore, a left join should be used FROM the datamart TO Applicant_Main if you wish to see all UI Claimants.
- The fields include the most recent occupation code and NAICS codes for the last three industries. The employer_1_naics_code is the most recent employer. There are no employer names/addresses for confidentiality reasons.
- The datamart can be linked to zip code tables (it will have a 5-digit zip code and, in a separate field, the 4-digit extension).

- There is no office code, but the zip code of residence can be used to link through several tables to arrive at the SDA Description field, except for those with out-of-state addresses.
- The education and ethnic code fields, as well as fields called "return_to_work_type_cd" and "claim_last_sign_type_cd" link to the 4-digit Codes2 tables for descriptions.
- Each week the most recent UI claim sequence number is selected for each SSN for claimants who are not union members and without a withdrawn claim. This record overwrites/replaces any existing record in the datamart.
- The datamart is cumulative since 7/1/07. Records are updated only if there is new activity for an SSN.
- The return_to_work_type filed is self-reported, and according to anecdote, is often null even if the customer has returned to work.
- To use the datamart for reports, you would most likely use the claimFiledDate and the claimLastSignDate to limit records. It is impossible to tell what an older lastSignDate means—the customer could have exhausted their benefits, their benefit year could have expired with no new claim (there can be up to a two-week lapse before resigning up for benefits), or they might have returned to work.
- The datamart can be used for outreach to UI Claimants who have not come into the center, for outreaching to and matching UI Claimants with certain occupation/industry histories to job openings, for up-to-date demographic reports by community, etc. The view could also potentially be used to identify those customers who have reported going back to work; if they had used the career center, it could act as an alert that staff should call for job placement details.
- Les handed out a draft of the UI Claimant Datamart View field descriptions.
- A chart handed out at the Partner's meeting a couple of months ago showed how the various types of UI benefits worked and could be helpful to report writers.

Next Meeting: Friday, September 11