



USER GROUP

Minutes

Wednesday, February 24, 2016

Webinar Meeting

Members Present: Rebecca Freund (01), Suzanne Reinstein (02), Anita Gorham (03), Debbie Kelly (05), Jane Spencer (06), Joleen Prentice (07), Jimmy Watson (11)

Members Not Present: Julie Mitchell (09), Tia Rice (10)

Excused Members: Al Hesse (04), Richard Price (08)

Other Staff Present: Chamia Gary (02), Lisa Maylen (03), Cheryl Wroblewski (03), Ed Hudson (08), Merry Lienau (08), Amy Scarborough (09), Matt Riley (11)

DWD Staff Present: Scott Fromader; Jackie Summerton; Cathy Sill; David Arb

Call to Order

Anita Gorham called the meeting to order at 9:33 a.m.

Review & Approve AUG Minutes from January 27, 2016

No revisions made to minutes. Rebecca motioned to approve the January 27th minutes. Debbie seconded.

WWDA Update

No updates. WWDA did not meet in February due to weather.

ASSET Updates

Cathy is working on re-employment changes to ASSET.

WebI Updates/New Participant Report Demo

Jackie is currently working on a number of reports and was not sure which report to address in this session. She asked for clarification.

Anita mentioned that this was a question from Jane and that she may be better suited to explain which report to address.

Jane explained that the participation report that her WDA was using were not capturing the actual number of participants they are serving. She mentioned to her staff that Jackie is working on a new report and when she ran that report, she was not getting the same number of participants that her staff were serving. The staff gave her some PINs that were not showing up on the report; however, when you go into ASSET, the customers have open services. Therefore, she wanted to re-visit this topic due to the discrepancies she and her staff are having with this report.

Jackie demonstrated the report to the group. She created a different WebI report #07 to capture the participants in date range. The report specifically looks for new participants within a timeframe based on the

participation date of the customer. You can enter WDA or Job Center for additional criteria. Jackie realized that the information Jane is looking for revolves around what participants are active within a date range.

Jane confirms that is the information she is looking for.

Jackie states that she would re-do the report and possibly make it Webl report #01, and she asked if Jane uses the series 1 report.

Jane replied that she does not use report #01, but uses the second report #07 because she could count the participants who had open services during that timeframe.

Jackie stated that what Jane was saying makes sense and showed an example of Fox Valley to the group. She went on to mention that she would update the report to show those who participated within a date range and who remains open and send it out.

Jane asked if we can query per program to determine how many are in a particular program.

Jackie stated that we can query by program. She asked if there is anything else that Jane wanted to be added to the report.

A statement was made that some WDAs have a number of contractors and wonder if the contract ID can be added or something similar.

Jackie replied that she could add office locations or case manager names to the report and the inclusion of case manager names was accepted, but the person making the statement would like as much information as she can get in the report. Jackie replied that she could put as much information as she needs into the report. She concluded that she will make the changes and it will go under report #01. She will also let us know when the report is ready.

Jackie reported that the few who took the Webl training now have access, but not perfect yet. Tyler Bourchardt contacted her and is creating some reports. He asked Jackie about a Case Management report. She thought it was a good idea and we have similar reports, but not quite what we are looking for. The report is broken out by the service that was provided which would not always be correct. So Tyler asked her how he can do it by case manager. Jackie stated that would not be easy. Jackie mentioned an alternative by getting the name of the person on the program screen for the individual programs. Jackie asked the group would this person be considered the case manager.

Comments from the group stated that is not necessarily true because that name could be of a person who is no longer there and that the new case manager would have to physically change the name in ASSET.

Jackie asked the question, How do you determine who is the clear case manager?

A comment was made that in their area, they just know who the case manager is looking at the name on Managed Program Tab and knowing the successor. Sometimes it's not cut and dry because people leave and one person's caseload can be broken up and given to others. It is not easy to pull or select a report.

Jackie states that has been her issue all along. Jackie demonstrates to the group how to determine who the case manager is by going to the Manage Program tab and looking for the name of the person listed on that screen. It is the closest thing they can do in Webl unless we can come up with a better way to determine the case manager. She explained that if we do it by staff names on services, then we would have several different case managers if services are given by different people. She recognizes that there is a disconnect between who is truly the case manager and who is just providing a service. She asked if we are finding this to be a problem.

Another person commented that their staff change the name attached to the services and on the program tab to the new case manager. This keeps it updated.

Jane mentioned that is what they do in her area as well.

Jackie asked if they change the program or the services and Jane responded program. Jackie stated that is the best way to do it across Title 1 programs. She is going to work with Tyler on the case management reports that make more sense for case managers, and if we can think of anything to add, just let her know.

A final comment came in stating that people need to be properly trained on how to update the appropriate sections in ASSET to reflect the actual case manager for that participant. She indicated if this is not done, when a case manager account is inactivated, names on the services will be blank on the manage services screen.

Another comment came in stating that a good tool to use would be the transfer caseload function in ASSET under WDA Approver Tools. You could transfer from an inactive staff to an active staff. This would update program page automatically. Another person mentioned that when this tool is used, it does not update the other two tabs and therefore they instruct their staff to update those as well.

Discussion was held about when the transfer of caseloads is conducted, then it must be done separately for each program a person may have had because there were instances where reports did not match (selective service report). Jackie stated that we should still use the same reports we have been using and she will work on the WebI side to make sure the information is in sync. And if we find that two reports are not in sync, to let her know and she will fix it.

Amy brought up point that we could use the "all" selection and it should change all the programs of a participant to a different case manager.

Jackie asked if there were any more reports we would like to see and a request was made to see if we can get the selective service number added to the selective service report. Jackie mentioned this request might take a while since this information is not in the warehouse right now.

Jackie re-visited a topic from the past regarding the addition of the planned exit date to a report. She announces that it has been added and now needs to be tested. Also, the education status was coming from the customer input and not the program input. We need the information to come from the program input page. This change has been made and needs to be tested as well. Then she can continue work on the 5% youth report.

WIOA Update

Scott has no updates. He wanted to remind everyone about the roundtable event on May 3rd and 4th at the Chula Vista. He wants to know if anyone received the invitation for this event and a few responded by saying yes. Scott thinks that the invitations went to the Executive Directors and to check with board staff or members to see if they received the invitation to pass along to other staff. He stated that more people are invited because of the new partners. The event will be a high level review and he did not see any operations view of WIOA. He cannot confirm the exact agenda topics for the event.

Jane mentioned that she has saved the date for her service providers and staff members due to the lack of an agenda. Once the agenda has been sent out, then her staff will make their reservations to attend the appropriate day(s) to ensure job center staffing is not an issue.

Scott is concerned about the number of questions received in regards to WIOA. He mentioned that very few are being submitted to state level for answers. The last document sent out was the interim program guidance. He wanted to know if everyone was comfortable with where they are at with WIOA knowledge across Title 1

programs. He thought that there would have been more questions about the programs, especially the youth program. He's a little skeptical about the low number of questions coming in.

Jane mentioned that she is sending questions to specific people, but have been following the guidance given to us and should expect more questions when the final rules come out.

Scott mentioned that he is comfortable with where we are in a good position from the standpoint of the lack of policy information and it gives us a lot more freedom to explain things to people. If we don't have a definitive direction, state and local staff are making a good-faith effort to interpret what we have. He believes the LPLs are going to a time with monitoring next year due to this lack of information. There has been only two youth TEGs put out in two years. There hasn't been a lot of additional information put out besides the law. He has had training prepared since July 2014, but still unable to hold those training sessions and hopes that it does not have a negative effect on the programs in the end.

Jane hopes that when the final rules come out that DWD and DET will hold a real operational roundtable event for practitioners that will include more detailed training topics.

Scott made recommendations two years ago on the policy side of the law and for youth program training to be provided in a one or two day event. He does not know how or when this will happen.

Anita agrees that the training would be beneficial if we ever get the regulations.

Other Business

No other business.

Recommended AUG Highlights for WWDA

- Working on WebI report revisions to ensure we are pulling accurate data.
- More specific information is needed on agenda topics for the 2 day WIOA Roundtable so managers can make informed decisions about staff attendance on appropriate day(s) to ensure job center staffing is not an issue.

Adjourn

A motion was made by Anita to adjourn; seconded by Joleen. The meeting was adjourned at 10:17 a.m.

Minutes respectfully submitted by Jimmy Watson (11)

Next ASSET User Group meeting; Wednesday, March 23, 2016 - Minute Taker: Tia Rice (10)