

Workforce Investment Act (WIA)
ASSET User's Group
T.E.C. Corridor/Room 104/105
3591 Anderson St.
Madison, WI
Thursday, March 22, 2007

Minutes

Meeting called to order by Al Hesse at 9:35 a.m.

Members present: Lynn Krause (01); Anita Gorham / Renee Kemp (03); Al Hesse (04); Debbie Kelly (05); Jane Spencer /Dorothy Miller (06); Joleen Prentice (07); Amy Scarborough (09); Tom Swoboda (10); Shannon Moe (11); Diane Bartels / Matt Mita (DWD)

Afternoon attendance: Richard Price/ Bob Batchelor (08)

The minutes from February 22, 2007 were reviewed. The following amendments were discussed. The spelling of Dorothy Miller's first name needs to be corrected and the 3rd bullet under Discussion Outcome (action items) on page 2 needs to be amended. The correct wording should be, "If do-able, Matt may be able to do Amy's suggestion to all that were related to case managers' reports on the System Reports, along with Case Load Report." Anita Gorham made a motion to approve the February minutes with the amendments, seconded by Debbie Kelly.

WAJTE Highlights

1. ASSET Upgrades and budget: Approximately 150 hours remain in this year's budget; those hours are being held in reserve for emergency fixes; most enhancements will be put on hold. NOTE: DWD revised its position on creating the "pre-exit" screen and advised the AUG after this meeting.
2. TESSA: Tentative approval given to go ahead. WDA 8 expects to begin using within 2-3 weeks.
3. CMDR and UI (or lack of): Issue reviewed again this month. Learned last month that this is a legislative issue according to Tim Hineline (DWS Security) – lack of UI makes CMDR less useful for WIA CM's. It also creates problems when trying to effectively evaluate performance.
4. WEBI: Trying to get more functionality for those members with the ability to create "ad-hoc" reports. Also working on streamlining the number of reports already in use.

Action items / requests from last meeting

Matt reported that there has been no work done on the breakdown of the case managers' report. Matt posed the question of needing the breakdown of case manager if we are searching by office. Some of this can be accomplished in

WebI. Discussion followed. All agreed that the ability to search by case manager was useful in 2 ways – one for the case manager's own use and the other for the supervisor's use. It would be useful to search by case manager and then by office detail with a truncated column due to case managers in numerous offices. Matt expressed concern that we can place numerous PCRs. However, the reality is that there is only 150 hours to get through the remainder of the year. Many of those hours are needed for emergencies. There is just not enough for enhancements. The budget for next year will likely be cut even more. The PCRs are in; it's just not likely to occur because of money issues.

Diane continued the discussion with PCRs that were requested during the February meeting. There are 4 PCRs that are in from the last meeting - #29619, #29620, #29621, and #28349. These are all work in progress.

There is an issue on the 3rd action item from the February minutes. The WDA-side search is too large. Matt reported that it is not an option for the system exit warning report. One can search exited participants in WebI (#38). Anita is currently editing this report for her case managers to know when to do follow-up. This issue was tabled until we get to WebI issues later today. Other action items were reviewed. Al informed the group that at this moment Richard Price was meeting with folks at DWD to discuss TESSA. We hope that when we reconvene after lunch, Richard will be here to give us an update. Last month Jane Spencer requested assistance with setting up funding codes for their Incentive Award. Jane reported that Diane helped her complete the necessary task in ASSET shortly after the February meeting.

ASSET Updates

The pre-exit screen request is still a NO due to budgetary reasons. At one point TAA was willing to pay for such a screen because that program has money in the budget to make changes. However, TAA is no longer willing to pay for such a change because a pre-exit screen is not relevant to that program. However, Ron Danowski is willing to work on an edit or an alert. The concern is that an alert is not what T1 needs. We need a place to store the information and then eventually that information could populate. The group feels frustrated and unsure of what the next step should or could be to solve the issue. Definitely the issue will be brought to WAJTE's attention. Another suggestion was to search for a grant to help with needed changes. Tom Swoboda offered an explanation of TAA as a Federal program that comes with funded mandates. WIA, on the other hand, has mandates without the funding. Matt shared the example of the implementation of Common Measures that came with an estimate of 100 hours of work. That was unrealistic! We do not know how much money would be necessary to budget for the changes that have been requested. This would be important information to take to WAJTE. Matt estimated that it would take 3-5 hours to work on an estimate. Matt and Diane suggested that the issue be discussed with members of the Job Center Systems Business Area.

The issue remains important to WIA. What about other programs? It is not the same issue with T3 or Vets as they do not update screens at exit. This is more

of a T1 issue. Discussed what is required at the time of exit. Anita has a list of that information and will send the list out to all ASSET members. AI reminded members that all issues we raise go to the WAJTE group via our minutes. WAJTE's next meeting is April 4th.

Diane continued with ASSET updates regarding the next rollout for ASSET 2.73. She reported that some of the releases are still planned to go into production at the end of March. Other's have been delayed and scheduled at the end of April. Diane reiterated that the late April date is tentative.

Diane reported that the ASSET online performance system report #28348 is in "not started" status. We think this is something that Nancy is working with. Diane reviewed with the group other bundled requests in 2.73. There was a request made by the AUG in April 2006 related to case load in follow-up report. Webl report #70 was created in November 2006 and has since been closed on the To Do List.

Changes #29293 and #29294 apply only to DWD security issues, possibly related to TESSA and/or the Virtual Job Center. Many changes in this rollout involve TAA. Matt explained the TAA changes that have been requested by Ron Danowski.

Other changes include the Youth program registration screen (#29648). The Basic Skills Deficient option will freeze, become not updatable once Yes is selected and saved. Changes to this field will need to go through the staff request process. Also for the Youth Program, the Weekly Hours of Participation field on the Services screen will become a "not required" field. This field will however still be available.

A system change to the date of youth participation will go into effect to prevent participation if the youth turned 22 before a program element occurs. If the youth turns 22 in the time between registration and actual participation, an error message will pop up. The youth would then have to be served in the Adult program.

The Vet's Report Registration Status has already occurred per Matt.

There was a request related to UI for the TAA program. That request is on hold due to the UI issues. PCR #29744 TAA issues will go out in 2.73 possibly by the end of April. March 30th there will be 3 data fixes; therefore we need to update the data fixes. Diane will fix that sheet.

Immediately following the morning break, we briefly discussed the upcoming spring Roundtable currently being planned by TAT group. AI shared the draft plan that will cover all program areas.

WebI Reports

Dorothy did receive some feedback on a report used frequently by Job Developers. Because reports #54 and #55 are only downloaded once a month, the data is old. We would like downloads more often for data to be adequate. In

JobNet Business we would like job orders to include more information such as benefits. Also the contact information is not always correct. The report was reviewed.

Diane suggested that Dorothy email the report with the request to Becky Powell or Linda Williamson as neither Matt nor Diane work with this report. JobNet Business is not ASSET-based. Anita may be able to edit or filter the contact information. Two issues were identified. This report needs to be updated more often and the report needs more contact information. Dorothy will work with Anita.

The group discussed some reports that were widely used. Diane reported that traffic on Webl shows low usage. Diane also shared that Nancy is willing to work with members on the youth performance report, and has volunteered to assist in the development of other like performance reports. Anita has been working on editing some reports. Some of us do not always know what elements are used to make the reports. For most it is a time issue. Matt is not sure exactly what Nancy is using. If she is using the #9090, it will be correct. Nancy does not include/involve AOS staff when she pulls her reports. Amy Scarborough stated that she has analyst status. She considers herself to be computer and Access literate, yet she doesn't always understand the Webl and Universe system. How can we learn more about the concept of the universe and how Webl works? Diane will address this issue after the lunch break when she discusses training needs. Most feel that the Webl system is overwhelming, yet extremely important. DWD sees the low usage as not user important. There is definitely a breakdown between the 2 ends of the system. Looking at this issue is for the purpose of paring down the number of reports. AI suggested that using date parameters would work well. However, dates and PY could be combined to cut down the number of reports. Anita stated that performance measures are extremely important and she is willing to work with Nancy but is concerned on spending money to create reports that don't get used. We were reminded that Webl is coming out of a different pot of money. We all agree that it is important to look at the reports by measures, but not always capable due to the hold on UI data. We still can look at performance projections. How do we get around the UI issue? Are UI reports run quarterly or monthly? Diane will ask Nancy again if it would be possible to run the Quarterly reports monthly (excluding any Wage Information).

We identified 2 main uses for Webl reports – programmatic (this would include grant-writing) and performance monitoring. AI feels that Webl reports could be pared down and yet still useful if the PY options were eliminated and replaced with date parameters with current date as the default.

- Shannon Moe made a motion to condense the Webl list by eliminating the PY option when the elements are the same as the same report with date parameters using the current date as the default. Dorothy Miller

seconded. No further discussion was necessary. All members were in favor of this motion.

Lynn Krause requested that Diane pull up WebI report #58 Skill Attainment. Members reviewed the report. Lynn's concern is that the report is only prompted by WDA and is over 140 pages. The planned date, date skill was attained, and performance related was not making sense. Diane suggested that Lynn send the concern and any request of adding a date range to Nancy directly. We discussed that Nancy still has a tutorial out in draft. Diane and Matt will take the above requests to R&S (Research & Statistics) in the next 2 weeks. Any changes will be dependent upon available money. Jane Spencer asked if there was a basic training specific for WebI. Anita reported that there is a PDF document that she will send out to everyone. Shannon asked if more of the basic training could be put in the format similar to the recent SSN Validation training. That training was in Captivate. We are unsure of where that process is at this time.

Lunch Break

UI Data

Briefly discussed the issue of no access to UI data. What are our next steps? We do know that the issue will go to WAJTE. Can they assist us in getting that access?

New Business

Diane distributed a handout titled JCSBA Training Needs Meeting. This document was a result of a meeting identifying WebI and ASSET User Groups and the different levels of training needs (See handout for details). Diane asked the AUG to look over this document and identify levels of need that may have been missed. Diane asked that we send any additions or comments directly to her by March 29, 2007. We will plan to review the feedback at the April AUG meeting.

Matt explained that the long term plan is to utilize the Captivate program to create training modules for the different levels of training needs. There is TAT monies available for this type of plan.

Lynn Krause asked the group how critical it is to use the follow-up screens in ASSET. Discussion implied that it is important for the gathering of supplemental data and global exclusion information. The most important is the first tab- Employment Overview. For youth, there is a retention question on each tab for the quarters. All other information entered is for local recording.

Diane discussed the issue of record retention. She stated that the WIA program manual states that participant files must be kept for 3 years beyond exit. She also realizes that an email went out stating the need to keep files for 7 years. We all realize that the program manual needs to be updated. Diane suspects that

the WIA Policy Unit and will ask that the change be 7 years. We all agreed that the program manuals are old and someone needs to take the time to get them updated.

Richard Price asked if "Free Lunch" was yet defined. Diane reported that she knows that Scott Fromader is working on the matter. Diane will check with Scott. Some WDAs are using it for eligibility until further clarification is determined.

"To Do List" review

Al announced that it is still his intention to synchronize the PCRs. He distributed the most recent copy of the To Do List to all members to review. The following items on the list were discussed:

- TDL101 – Open as Anita will work on per earlier discussion
- TDL106 – Open as Bob Korb is working on
- TDL102 – Open due to rollout of 2.74 as discussed earlier
- TDL103 – Placed on hold
- TDL104 – Open and Richard will provide update
- TDL105 – Closed due to policy that defined what is considered a valid credential. However, there are still some programs that need approval from DWD.
- TDL107 – Consolidated with TDL103
- TDL108 – Open as PCR#29744
- TDL109 – Remain open, may or may not happen as 2.74
- TDL110 – Remain open as Diane will talk to Becky & Linda per discussion earlier today.

The second page of the list consisted of all on-hold items. Al asked members to review the list. Action items from earlier discussions today will be added to the list. For complete details, see ASSET To-Do List revised on 2/28/07.

TESSA Update

Richard introduced Bob Batchelor, computer programmer from WDA 8. Richard announced that they both were in a meeting this morning with Tim Hinline, Steve Pionke, Mark Dwyer, and Rick North. Basically there was a hang up with an ID password issue. They have worked together to work around that issue. TESSA is now a go! In his WDA, TESSA will be in the testing environment within 2-3 weeks. This means so many new possibilities regarding reports, performance, and saving time for case managers. It will be possible to fully integrate back-end programs. It will also be possible to manage non-ASSET programs and services. WDA 8 plans to have TESSA fully operational by June 30th. There have been many questions of when and how much it will be for other WDAs to get access to TESSA. Richard is not sure at this point of when it could be available outside of WDA 8. However, that is the end goal. Richard will try to have a demonstration of TESSA by the April AUG meeting. There are 3 AUG meetings before June 30th. He will continue to give regular updates and demonstrations at each meeting. Al and Richard have discussed forms that could be generated from TESSA. There is still work to be done with forms.

Richard wants forms to be generic enough and useful to everyone. He will give this more thought and discuss again next month. We may consider creating a subcommittee or informal group to review forms. We all look forward to seeing future demonstrations and hearing about TESSA's progress in WDA 8.

Al reminded the AUG members that WAJTE does review our minutes and we need to be sure to capture the major highlights. WAJTE meetings are held the first Wednesday of each month. This is the reason that our minutes are due the Monday following AUG meetings. A summary section will be added to the minutes to aid WAJTE members. This section will be added after a draft of the minutes are ready.

Shannon Moe made the first motion to adjourn, Anita Gorham seconded. The meeting adjourned at 2:20 pm.

Next meeting Date: 4/26/07

Minutes submitted by Jane Spencer (WDA 06)