

## E-Mail or Mailing List - No Service in N Days-Export-G

**Development Version:** Crystal Reports XI, Service Pack 2

**First Issuance Date:** 1/16/08.

**Modification Date (1/25/08):** Added local office parameter option and added phone number.

**Modification Date (2/3/08):** Added provider of last service. Modified to use the adhoc applicant cycles table.

**Modification Date(2/4/08):** Added special support service type code (831); changed datetimes to dates.

**Modification Date(2/10/08):** Changed field names; changed report orientation to improve export; added provider of last service.

**Modification (2/22/08):** Removed customers who have been manually inactivated on or after the most recent service date.

**Parameters:** Location Level; Career Center; Local Office; Start Date; Number of Days (since last service).

**Parameter List of Values Updated Date:** n/a.

**Key Features:** This report is designed for exporting to Excel for use in creating e-mail lists for those customers with e-mails or mailing lists and/or mail merges for those customers with no e-mail. This report identifies customers whose most recent service occurred between the selected start date and N number of days before the report run date (data date) **for the selected location. Note that if the report is run for a local office, the most recent service date will be based on that office only; if run for a career center, it will be based on the career center as a whole.** The most recent service is drawn from both supportive (general) and job services that are OSCCAR approved. Customers who have been manually inactivated on or after the most recent service date have been removed from the report. Customers whose most recent service is entered employment have been excluded from the report, but customers who entered employment during the specified period, but who have received a service since then, are included—they might have lost the job or needed career center support to retain the job. Please note that, like the "Call List-No Svc in N Days" Report, certain supportive services that are not OSCCAR approved have been allowed in the report in order to help the user determine whether contact makes sense. These services are limited to outcome/enhancements that have the following results: Moved from Area, Lost Child Care, Substance Abuse or Dependence, Retired, Relocated to Mandated Residential Program, Health/Medical, Entered Military Service, Institutionalized, Family Care, Lacks Transportation, Cannot Locate, and Reservist Called to Active Duty. Customers whose most recent service falls into one of these outcomes are shown in bold italic. In addition, customers who have a recorded outcome of "Deceased" have been excluded from the report. If you wish, you can run the Call List-No Svc in N Days report in order to identify the reason these customers are bolded, and then you can manually remove them if you wish after export of the current report.

The selected start date will limit the customers shown to those who have received a service sometime since that date. The user then enters a number indicating the number of days that have elapsed since the customer's last service. If the user enters a "0", the report will return all customers who have received a service since the start date, but whose last service is not an entered employment. Thus, the report can be used both for contacting people who have not recently used the centers to encourage their return, and also to contact people to determine whether they have recently entered employment and to collect placement information.

**Note that since this report uses a table that is compiled nightly, if the report is run during non-work hours, there is the possibility that the data recorded in MOSES that day and data recorded in the ad hoc cycles table will not be quite in sync, and that the report will return slightly inaccurate data, e.g., if a customer received a service on the current date, the data could appear after 5pm in some tables in this report, but not yet in the applicant cycles table. To avoid this possibility, it is best to run the report during before 5pm, Monday to Friday.**

**Exporting:** Before exporting, the user should right click on the gray area to the left of the report and select suppress (no drill-down) for the following report sections: Report Header (RH<sub>a</sub>, this page); Report Header b (RH<sub>b</sub>, top of next page); and the report footer (last page, where the total number of customers is shown). When exporting, and on the options page, choose Group Header #2 as the report section for determining column width. If you wish, once exported, you can sort the resulting data by provider within each group (e-mail or no e-mail) by going to data->sort and sorting first by provider and then by last name and first name.

**Report Run Times:** About 5-10 minutes, depending upon the date range selected.

**Report Feedback:** This report has been tested for accuracy; however, we encourage your feedback—if you get unexpected results or have other suggestions, please contact the report developer below.

**Report Developer:** Linda Bass, lbass@detma.org, 617-864-1570.



























