

Follow-up Retention History-E

Crystal Reports Version: Crystal Reports XI, Service Pack 2.

First Issuance Date: 7/12/07.

Modified (10/8/07): Changed name from 'Follow-up History' to 'Follow-up Retention History'.

Modified (10/13/07): Required job start date to be within report period.

Modified (11/25/07): *Allowed job start date to be after exit; adjusted the WIA Criteria columns to reflect an adjustment in the followup period codes required per quarter after exit based on the difference in months between the job start date and the last month of the exit quarter. This report assumes that followup codes are entered based on the elapsed time since the job start date, e.g., a 3-mo followup reflects that someone is working three months after the job start date, regardless of the exit date. The WIA columns are then adjusted to reflect whether the person was still working at the particular quarter after exit, based on the followups to the job start date. Note also that highlighted columns reflect time elapsed from the job start date, not from the exit date.* Also suppressed case managers and customers if the case manager's home office was not in the current career center group. Removed "can grow" from fields and allowed name and related fields to repeat for multiple jobs in order to optimize report for export.

Parameters: Location Level, Region, Career Center, Local Office, Start Date, End Date, Program, Highlight, Case Manager, Group By Case Manager, Group by Exit Quarter (within Case Manager group if it exists; otherwise, within local office. **Note that the user MUST select a region regardless of the selected location level.**

Parameter List of Values Updated Date: 1/21/08.

Key Features: This report shows all Title I (Youth, Adults, or Dislocated Workers, based on the funding source selected) or Trade enrollees who were active at some time during the selected time period and who have entered employment. Status at followup is shown for periodic follow-up (status plus date) and months 1 to 12 following the entered employment date. The user can choose to highlight all 12 or only selected follow-up periods if contact is due. If, for example, local practice is to contact customers at 1,3,6, 9 and 12-month intervals, then those particular periods can be highlighted if contact has not been made. Note that due dates are based on intervals of 30-days compared to the currentdate. Following the 12-month periods, are three columns specifically relating follow-up contacts to WIA performance criteria. The columns check for the presence of contacts at critical periods and also check for up to two subsequent entered employments during quarters after exit in lieu of continuous employment in the same job.

Customers with exclusionary exits are highlighted in aqua.

The report can be run by region, career center, or local office, and for all case managers or for a selected case manager. It is grouped by career center and local office, and if desired, also by case manager and/or exit quarter. If you choose to group by case manager, there will be a new page after each case manager, in case you want to distribute parts of the report to specific case managers.

Please note that the summaries in this report are intended to assist the user in gauging current WIA performance; however, the summaries are not identical to those used for formal WIA Performance, which is based on UI wage records, not on data entered into MOSES.

Export to Excel: Right click on the gray area to the left of this description page and select "suppress (no drill-down)". Then go to file->export->choose the regular export to Excel (not data only), and for the column width choose "Group Header #7".

Report Run Times: A few seconds/minutes.

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.

**Follow-up Retention History
 WIA Title I Dislocated Workers
 Region/Career Center/Local Office Name
 1/01/2007 to 12/31/2007**

Months 3, 6, 9, 12 have been selected for highlighting if follow-up contact is due.

App ID	Name	Phone	Enr Date	Exit Date	Exit Qtr	Employer	Job Title	Job Start Date	Wage	Hrs Week	Periodic	Month												WIA Criteria		
												1	2	3	4	5	6	7	8	9	10	11	12	1st Qtr After Exit	2nd Qtr After Exit	3rd Qtr After Exit
99999999	Customer Name	555-555-1212	9/1/07	9/10/07	FY08-Q1	Employer	Special Ed Tear	9/10/07	\$23.35	35.0		Y												Y		
99999999	Customer Name	555-555-1212	1/9/06	7/16/07	FY08-Q1	Employer	Medical Assista	7/16/07	\$13.00	40.0		Y														
99999999	Customer Name	555-555-1212	10/6/06	3/21/07	FY07-Q3	Employer	Technical Sales	3/21/07	\$17.00	35.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	8/14/07	9/29/07	FY08-Q1	Employer	Ps Implementat	9/29/07	\$43.27	40.0		Y												Y		
99999999	Customer Name	555-555-1212	8/14/07	10/22/07	FY08-Q2	Employer	AR	10/22/07	\$18.00	40.0		Y														
99999999	Customer Name	555-555-1212	3/30/07	6/25/07	FY07-Q4	Employer	Payroll	6/25/07	\$18.27	40.0		Y												Y		
99999999	Customer Name	555-555-1212	7/10/07	8/13/07	FY08-Q1	Employer	Customer Servi	8/13/07	\$14.00	40.0		Y														
99999999	Customer Name	555-555-1212	2/13/07	3/19/07	FY07-Q3	Employer	Splice Service T	3/19/07	\$11.75	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	9/26/05	1/22/07	FY07-Q3	Employer	IT Specialist	1/22/07	\$25.00	40.0		Y														
99999999	Customer Name	555-555-1212	4/20/05	2/5/07	FY07-Q3	Employer	Assistant Facilit	2/5/07	\$40.11	35.0		Y		Y			Y							Y	Y	
99999999	Customer Name	555-555-1212	8/14/07	9/10/07	FY08-Q1	Employer	Assistant Librari	9/10/07	\$18.00	37.5		Y												Y		
99999999	Customer Name	555-555-1212	1/9/07	4/30/07	FY07-Q4	Employer	Registration Scf	4/30/07	\$13.25	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	3/13/07	9/4/07	FY08-Q1	Employer	Sr. Admin. Assi:	9/4/07	\$18.27	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	3/20/07	8/6/07	FY08-Q1	Employer	Journeyman	8/6/07	\$35.00	40.0		Y														
99999999	Customer Name	555-555-1212	3/28/07	8/1/07	FY08-Q1	Employer	Admissions Coc	7/30/07	\$15.00	40.0		Y														
99999999	Customer Name	555-555-1212	7/6/06	2/26/07	FY07-Q3	Employer	System Adminis	2/26/07	\$20.60	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	3/27/07	5/27/07	FY07-Q4	Employer	Supervisor, Nor	5/27/07	\$28.85	40.0		Y														
99999999	Customer Name	555-555-1212	8/15/06	11/19/07	FY08-Q2	Employer	Office Manager	11/19/07	\$24.04	40.0		Y														
99999999	Customer Name	555-555-1212	2/13/07	5/18/07	FY07-Q4	Employer	Clerk	5/18/07	\$11.50	35.0		Y														
99999999	Customer Name	555-555-1212	1/9/07	9/4/07	FY08-Q1	Employer	Radiologist Sen	9/4/07	\$19.75	40.0		Y												Y		
99999999	Customer Name	555-555-1212	9/12/07	10/1/07	FY08-Q2	Employer	Informational Sc	10/1/07	\$23.08	40.0		Y														
99999999	Customer Name	555-555-1212	1/19/07	7/23/07	FY08-Q1	Employer	IT Administrator	7/23/07	\$36.54	40.0		Y														
99999999	Customer Name	555-555-1212	8/16/06	9/1/07	FY08-Q1	Employer	Professor	9/1/07	\$36.54	40.0		Y												Y		
99999999	Customer Name	555-555-1212	11/21/06	4/17/07	FY07-Q4	Employer	Appointment Se	4/17/07	\$10.00	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	10/30/06	1/2/07	FY07-Q3	Employer	Home Health Ai	1/2/07	\$12.00	40.0		Y		Y			Y							Y	Y	
99999999	Customer Name	555-555-1212	7/4/06	7/25/07	FY08-Q1	Employer	Administraative	7/25/07	\$18.00	40.0		Y														
99999999	Customer Name	555-555-1212	9/4/06	1/10/07	FY07-Q3	Employer	Owner	5/28/07	\$19.23	40.0		Y												Y		Y
99999999	Customer Name	555-555-1212	9/4/06	1/10/07	FY07-Q3	Employer	Owner	8/24/07	\$24.04	40.0														N	Y	
99999999	Customer Name	555-555-1212	1/9/07	2/15/07	FY07-Q3	Employer	Office Mgr.	2/15/07	\$20.43	40.0		Y		Y										Y		
99999999	Customer Name	555-555-1212	10/3/07	10/15/07	FY08-Q2	Employer	Regulatory Spe	10/15/07	\$70.00	40.0		Y														
99999999	Customer Name	555-555-1212	10/2/06	4/15/07	FY07-Q4	Employer	Project Coordin	4/15/07	\$21.63	40.0		Y		Y										Y		

**Follow-up Retention History
 WIA Title I Dislocated Workers
 Region/Career Center/Local Office Name
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App ID	Name	Phone	Enr Date	Exit Date	Exit Qtr	Employer	Job Title	Job Start Date	Wage	Hrs Week	Periodic	Month												WIA Criteria			
												1	2	3	4	5	6	7	8	9	10	11	12	1st Qtr After Exit	2nd Qtr After Exit	3rd Qtr After Exit	
99999999	Customer Name	555-555-1212	9/25/06	2/12/07	FY07-Q3	Employer	Practice Admini	2/12/07	\$15.00	35.0		Y		Y		Y									Y	Y	
99999999	Customer Name	555-555-1212	10/1/07	11/5/07	FY08-Q2	Employer	Commodity Buy	11/5/07	\$30.29	40.0		Y															
99999999	Customer Name	555-555-1212	9/29/06	2/12/07	FY07-Q3	Employer	HR Assistant	2/12/07	\$19.23	35.0		Y		Y		Y									Y	Y	
99999999	Customer Name	555-555-1212	9/11/07	11/26/07	FY08-Q2	Employer	Finance Payroll	11/26/07	\$38.46	35.0		Y															
99999999	Customer Name	555-555-1212	10/3/05	2/15/07	FY07-Q3	Employer	Deskside Suppr	2/15/07	\$18.00	38.0		Y		Y		Y									Y	Y	
99999999	Customer Name	555-555-1212	10/10/07	11/5/07	FY08-Q2	Employer	Clerical Assista	11/5/07	\$15.00	40.0		Y															
99999999	Customer Name	555-555-1212	7/5/06	5/17/07	FY07-Q4	Employer	Medical Transcr	5/17/07	\$20.00	36.0		Y															
99999999	Customer Name	555-555-1212	1/5/06	2/12/07	FY07-Q3	Employer	Inside Sales Re	2/12/07	\$13.75	40.0		Y		Y											Y		
99999999	Customer Name	555-555-1212	9/5/06	1/9/07	FY07-Q3	Employer	Business Office	1/9/07	\$19.00	40.0		Y		Y		Y									Y	Y	
99999999	Customer Name	555-555-1212	3/13/07	9/18/07	FY08-Q1	Employer	Administrative A	9/18/07	\$14.00	40.0		Y	Y	Y											Y		
99999999	Customer Name	555-555-1212	7/24/06	1/15/07	FY07-Q3	Employer	Customer Servi	1/15/07	\$13.00	40.0		Y		Y		Y									Y	Y	
99999999	Customer Name	555-555-1212	3/14/07	5/1/07	FY07-Q4	Employer	Driver	5/1/07	\$25.00	40.0		Y		Y											Y		
99999999	Customer Name	555-555-1212	1/14/06	3/26/07	FY07-Q3	Employer	Administrative A	3/26/07	\$10.00	20.0		Y		Y											Y		
99999999	Customer Name	555-555-1212	2/27/07	7/23/07	FY08-Q1	Employer	Charge Entry/cl	7/23/07	\$12.00	40.0		Y															
99999999	Customer Name	555-555-1212	6/1/04	7/30/07	FY08-Q1	Employer	Administrative A	7/30/07	\$16.00	40.0		Y															
99999999	Customer Name	555-555-1212	7/11/06	1/2/07	FY07-Q3	Employer	Waitress	1/2/07	\$10.00	40.0		Y		Y		Y									Y	Y	

Total Customers: 101