**Office of National Programs**

**Senior Community Service Employment Program**

**SPARQ Management Report Specifications for 8.2**

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|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| REVISION HISTORY | | | | | |
| Revised | Sent to Netlogic/ZTI | For Release | Changes | Requestors | Authors |
| 5/24/19 |  | 7.9 | Revised Follow Up 2 specifications for [All PY 2018 Pending FollowUps](#_ALL_PY_2018) | BCT/COG/MPR | S. Bond |
| 5/29/19 |  | 7.9 | Reviewed by BCT and COG |  | S. Bond |
| 4/15/20 | 4/24/20 | 8.0 | Added [Hours](#_PARTICIPANTS_WITH_COMMUNITY) Report | BCT/COG | S. Bond |
| 4/16/20 |  | 8.0 | Reviewed changes |  | J. Kozar |
| 4/22/20 | 4/24/20 | 8.0 | Revised Follow Up 2 specifications for [All PY 2018 Pending FollowUps](#_ALL_PY_2018) and [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE) to refer to new constructed variable *Q2 WAGE FUED* | BCT/COG/MPR | J. Kozar |
| 4/24/20 |  | 8.0 | Reviewed changes |  | S. Bond |
| 5/5/20 | 5/7/20 | 8.0 | Revised [Hours](#_PARTICIPANTS_WITH_COMMUNITY) Report to include Program Year in the details | BCT/COG/MPR | B. Li |
| 5/7/20 |  | 8.0 | Reviewed changes |  | S. Bond |
| 6/17/20 |  | FUTURE | Highlighted revisions to [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE) report pertaining to Q2\_WAGE\_FUED for future release | BCT/COG/MPR | J. Kozar |
| 6/19/20 |  | FUTURE | Reviewed changes |  | S. Bond |
| 7/1/20 |  | 8.1 | Changed highlighting for Preliminary Employment Rate/Median Earnings report revisions from future release to current release. |  | J. Willing |
| 7/6/20 |  | 8.1 | Reviewed changes |  | S. Bond |
| 7/23/20 |  | 8.1 | Revised introduction in [Hours](#_PARTICIPANTS_WITH_COMMUNITY) report. | BCT | J. Willing |
| 7/23/20 |  | 8.1 | Reviewed changes |  | S. Bond |
| 9/4/20 |  | 8.1.1 | Removed Availability Indicator from [Hours](#_PARTICIPANTS_WITH_COMMUNITY) report | BCT | J. Kozar |
| 12/8/20 |  | 8.2 | Revised introduction in [Hours](#_PARTICIPANTS_WITH_COMMUNITY) Report  Added additional enrollment fields to summary on Hours Report  Added fields summary hours table to Hours Report | BCT/COG | K.Campbell |
| 12/16/20 |  | 8.2 | Added countable hours constructed variable to Total Paid Hours in [Hours](#_PARTICIPANTS_WITH_COMMUNITY) Report  Added Total Paid CSA hours to summary hours table in Hours Report | BCT/COG | K. Campbell |
| 12/17/20 |  | 8.2 | Reviewed changes |  | S. Bond |

**Note:** The blue highlighted text below represents changes to be implemented in a future release of SPARQ. They should be ignored when this document is examined for changes to be made in the next release.

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# General Requirements/Instructions

Each Management Report has two sets of specifications:

Selection Criteria

Specifications for Displayed Data Elements

Each report has three sections: Report Options, Results Summary, and Results Details. Under Report Options, provide drop-down menus that control the domain of the report results according to SCSEP entity (see next paragraph). Also, display two checkboxes called “Show Results Summary” and “Show Results Details”. When the report is run, display the Results Summary section only when the former checkbox is checked, and display the Results Details section only when the latter checkbox is checked. Specifications on what the Results Summary and Results Details sections should include are provided for each report below in the “Specifications for Displayed Data Elements” section.

Each report must be available by grantee, sub-grantee, and state for national grantees. Display drop-down menus at the top of the report page that let the user select the grantee and sub-grantee. (The sub-grantee drop-down should be limited to just those subs under whichever grantee they select in the first drop-down.) Some reports allow users to select multiple sub-grantees by holding the Ctrl button and highlighting the desired sub-grantees. (Reports with this functionality are listed in [Appendix B](#_Appendix_B_–))If a grantee- or state-level report is run, group the records first by sub-grantee in ascending order of sub-grantee name, and show the sub-grantee name at the beginning of each grouping.

Each report displays the report date in the top right corner of the screen below the U.S. Department of Labor in the following format: MM/DD/YYYY. Below the report date, the date and time of the last successful completion of the Business Intelligence Process is displayed in the following format: MM/DD/YYYY HH:MM:SS, and labeled “Latest Refresh”.

Unless otherwise specified, each report should only consider records that are associated with the grantee, sub-grantee, and state for which the report was run, when making its calculations.

At the top of each report, display in bold its name formatted as “[Group]: [Report]”, e.g.,

**PARTICIPANTS: Waiver of Durational Limit**

For every Displayed Data Element, leave blank if none of the criteria are met. If no participants or organizations meet the selection criteria, display “No Results Found” in lieu of the Displayed Data Elements section.

All italicized variables in these specifications are constructed variables and, if not defined in this document, are defined in the Import File and Edits Specifications.

When running any report, except the [Current/Exited](#A_E) report and the [WDL](#Dur) report, in any format (HTML or csv export), for grantee codes 290, 143, 143R (AARP Old, Regular, and Recovery), 300, 146, 146R (EW Old, Regular, and Recovery), and 280, 158, 158R (SSA Old, Regular, and Recovery), require that a sub-grantee be selected.

In the specifications that follow, below the names of each report, a shortened name is provided, which will serve as a reference name from other areas of this document.

## Waiting Indicator

When a user clicks the Go button or Export button on the management reports, a message is displayed at the top of the page to inform the user that their request is being processed and they need to wait for the report to complete. The Go and Export buttons will remain grayed out while the query is processing and until the results are displayed.

## Report Export Files

The data in each report are exportable to a .csv (comma-delimited) text file. The records in the export file are the same records that appear in the details section of the report, meaning the export is limited to records that meet (a) the report’s search criteria under the selected grantee/sub-grantee, and (b) any filters that were applied when the report was run. The fields that appear in the export file are the concatenation of Grantee Acronym and Grantee Code (e.g., AARP143), Sub-grantee Code, and each detail element that is included in the report’s Displayed Data Elements section.

Column header titles in the export files follow closely if not exactly to the header titles in the html version of the reports. The exception is when the header is too long and needs to be abbreviated. Headers do not have leading or trailing spaces and are located on the first row of the export file. The data in the report begin on the second row.

For all report export files, the address fields appear in their own columns instead of one column that includes their values concatenated together.

Formatting such as bolding or italicizing are not applied to the contents in the export files.

## Report Enhancements

**“Active” filters**

In the report options for these reports: [Current/Exited](#A_E), [Reached DL](#_PARTICIPANTS_WHO_REACHED), [Host Agencies](#HAs)**,** [Assignments by HA](#CSAs_HA), [Employers](#Emps), [Placements by ER](#UEs_Emp)**;**

show a checkbox beneath the "Show Results Details" checkbox called "Display active [record type]s only". If this box is checked when the report is run, then include only those records on the report that meet the “Active Filter” condition, which can be found under that report’s selection criteria.

The [Assignments by HA](#CSAs_HA) and [Placements by ER](#UEs_Emp)reports get two such checkboxes, since they display two levels of records.

**Date filters**

In the report options for these reports: [Pending](#Pend), [Ineligible](#Inel), [Eligible](#Elig), [Waiting List](#WL),[Current/Exited](#A_E),[Reached DL](#_PARTICIPANTS_WHO_REACHED), [Break](#Break), [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp),

show two text boxes called "Starting Date" and "Ending Date" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either of these dates are valued when the report is run, then include only those records on the report where the "Filter Date" is:

a) on or after the Starting Date (if Starting Date is valued)

b) on or before the Ending Date (if Ending Date is valued)

c) on or between the Starting Date and Ending Date (if both dates are valued)

where "Filter Date" is defined for each report under its selection criteria.

Show a screen-reject-like error message when users attempt to do the following.

Action Message

Enter non-date values in Starting Date “Starting Date” must have format mm/dd/yyyy.

Enter non-date values in Ending Date “Ending Date” must have format mm/dd/yyyy.

Enter an Ending Date before the Starting Date “Ending Date” must be on or after “Starting Date.”

The [Current/Exited](#A_E) report has ***two pairs*** of date fields for this type of filter. The fields used for them are specified in that report’s specs below.

**Alpha-numeric Search links**

In the sub-grantee\* options for these reports: [Pending](#Pend), [Ineligible](#Inel), [Eligible](#Elig), [Waiting List](#WL),[Current/Exited](#A_E),[Reached DL](#_PARTICIPANTS_WHO_REACHED), [Break](#Break), [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp),[Pending FU](#PendFU), [Host Agencies](#HAs)**,** [Employers](#Emps), [WDL](#Dur);

beneath the sub-grantee name, show a row of all distinct characters (using only the 26 letters of the alphabet (where the capital and lower-case forms of each letter equal each other) and the 10 numeric digits) that appear as the first character in the “Alpha-numeric Search field” from all records. “Alpha-numeric Search field” is defined for each report under its selection criteria. For each character in this row, make it an active hyperlink, directing the web browser to the first record in that sub-grantee that begins with that character in the record's name.

\* For a grantee-level report, show a separate alpha-numeric row for each sub-grantee. For a sub-grantee-level report, show only one alpha-numeric row, directly beneath the report summary.

**Report Introductions**

At the top of each report, above the grantee/sub-grantee drop-downs, a brief description of the report is displayed. This description is defined as “Introduction” for each report under its Selection Criteria.

**Report Instructions**

At the top of each report, a link called “Other report information” is displayed. The link makes a pop-up window appear, which contains helpful text for that particular report, and a “Close” link below the text, which closes the pop-up window. The helpful text is defined as “Instructions” for each report under its Selection Criteria.

# Group #1: APPLICANTS

## PENDING APPLICANTS

**(Pending)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | All persons who |
| APPLICATION DATE is valued | Have applied to the program |
| **AND**  DATE OF ELIGIBILITY DETERMINATION is null | And whose program eligibility has not yet been determined |

**Introduction:** List of all applicants who have ever applied to SCSEP with this grantee or sub-grantee and had at least one enrollment where program eligibility had not yet been determined. The number of days pending from application date is displayed.

**Instructions:**

**Date Filters**

There are two text boxes called "Application Date From" and "Application Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Application Dates fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** APPLICATION DATE

Display “Application Date From” and “Application Date To” next to the associated Filter Date fields.

**Alpha-numeric Search field:** LAST NAME

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary-level elements** | |
| Number of Pending Applicants | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria |
| Average Days Pending | **Sum** of “Days Pending” **divided by** “Number of Pending Applicants” (round this result to one decimal place) |
| **Detail-level elements** | |
| Participant (label not displayed) | Format:  [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID]  [HOME PHONE NUMBER] [STREET], [CITY], [STATE] [ZIP CODE]  (where HOME PHONE NUMBER is formatted as “(###) ###-####” if it’s valued) |
|  |  |
| County of Residence | COUNTY |
|  |  |
| Case Worker | CASE WORKER |
| Application Date | APPLICATION DATE |
| Days Pending | *REPORT RUN DATE* **minus** APPLICATION DATE  **Note:** if value < 0, display no value **and** do not include in average |

## INELIGIBLE APPLICANTS

**(Ineligible)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | All persons who |
| APPLICATION DATE is valued | Have applied to the program |
| **AND**  ELIGIBILITY = Ineligible | And who have been determined to be ineligible for the program |

**Introduction:** List of all applicants who have ever applied to SCSEP with this grantee or sub-grantee and had at least one enrollment where they have been determined to be ineligible. The date of eligibility determination, reason for ineligibility, and demographic information are displayed.

**Instructions:**

**Date Filters**

There are two text boxes called "Eligibility Determination Date From" and "Eligibility Determination Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Eligibility Determination Date fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** DATE OF ELIGIBILITY DETERMINATION

Display “Eligibility Determination Date From” and “Eligibility Determination Date To” next to the associated Filter Date fields.

**Alpha-numeric Search field:** LAST NAME

**­Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary-level elements** | |
| Number of Ineligible Applicants | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria |
| Percent Age | **Percent** of Applicants where “Age” = X (see below); show count in parentheses after percent |
| Percent Income | **Percent** of Applicants where “Income” = X (see below); show count in parentheses after percent |
| Percent Residence | **Percent** of Applicants where “Residence” = X (see below); show count in parentheses after percent |
| Percent Incomplete | **Percent** of Applicants where “Incomplete” = X (see below); show count in parentheses after percent |
| Percent Other | **Percent** of Applicants where “Other” = X (see below); show count in parentheses after percent |
| **Detail-level elements** | |
| Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| County of Residence | COUNTY |
| Case Worker | CASE WORKER |
| Eligibility Date | DATE OF ELIGIBILITY DETERMINATION |
| Veteran | Indicate Y if (VETERAN\_TEXT = “a\_Veteran” **or** “b\_Eligible\_spouse\_of\_veteran”), else indicate N |
| Other Priority | Indicate Y if (*AGE* >= 65 **or** DISABILITY\_IND = “Y\_DOC” **or** LEP\_IND = yes  **or** SKILLS\_DEFICIENT\_IND = yes **or** URBAN\_RURAL\_IND = “Rural”  **or** POOR\_EMP\_PROSPECTS\_IND = yes **or** FAILED\_TO\_FIND\_EMP\_IND = yes  **or** HOMELESS\_IND = yes **or** HOMELESS\_RISK\_IND = yes), else indicate N |
| Minority | Indicate Y if (RACE\_AMERICAN\_INDIAN\_IND = yes **or** RACE\_ASIAN\_IND = yes  **or** RACE\_BLACK\_IND = yes **or** RACE\_PACIFIC\_IND = yes **or** ETHNICITY\_IND = yes),  else indicate N |
| Gender | GENDER |
| Reason for Ineligibility | (heading only) |
| Age | Indicate X if IF INELIGIBLE REASON (AGE) = yes, else indicate blank |
| Income | Indicate X if IF INELIGIBLE REASON (INCOME) = yes, else indicate blank |
| Residence | Indicate X if IF INELIGIBLE REASON (OUTSIDE RESIDENCE) = yes, else indicate blank |
| Incomplete | Indicate X if IF INELIGIBLE REASON (FAILED APPLICATION) = yes, else indicate blank |
| Other | Indicate X if IF INELIGIBLE REASON (OTHER (Y/N)) = yes, else indicate blank |

## ELIGIBLE APPLICANTS NOT ASSIGNED OR ON WAITING LIST

**(Eligible)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | All persons who |
| APPLICATION DATE is valued | Have applied to the program |
| **AND**  ELIGIBILITY = Eligible | And have been determined eligible for the program |
| **AND**  *INITIAL ASSIGNMENT DATE* is null | And have not yet been given an assignment |
| **AND**  PLACED ON WAITING LIST is null or N | And have not yet been placed on the waiting list |
| **AND**  NON EXIT REASON is null | And have not had their record closed for non-exit reasons |

**Introduction:** List of all applicants who have ever applied to SCSEP with this grantee or sub-grantee and had at least one enrollment where they have been determined to be eligible but have not been given an assignment or placed on a waiting list. The date of eligibility determination, number of days pending and demographic data are displayed.

**Instructions:**

**Date Filters**

There are two text boxes called "Eligibility Determination Date From" and "Eligibility Determination Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Eligibility Determination Date fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** DATE OF ELIGIBILITY DETERMINATION

Display “Eligibility Determination Date From” and “Eligibility Determination Date To” next to the associated Filter Date fields.

**Alpha-numeric Search field:** LAST NAME

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary-level elements** | |
| Number of Eligible Applicants | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria |
| Percent Veteran | **Percent** of Applicants where “Veteran” = Y (see below); show count in parentheses after percent |
| Percent Other Priority | **Percent** of Applicants where “Other Priority” = Y (see below); show count in parentheses after percent |
| Percent Minority | **Percent** of Applicants where “Minority” = Y (see below); show count in parentheses after percent |
| Percent Female | **Percent** of Applicants where GENDER = “Female”; show count in parentheses after percent |
| **Detail-level elements** | |
| Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| County of Residence | COUNTY |
| Case Worker | CASE WORKER |
| Eligibility Date | DATE OF ELIGIBILITY DETERMINATION |
| Days Pending | *REPORT RUN DATE* **minus** DATE OF ELIGIBILITY DETERMINATION  **Note:** If value < 0, display no value. |
| Veteran | Indicate Y if (VETERAN\_TEXT = “a\_Veteran” or “b\_Eligible\_spouse\_of\_veteran”), else indicate N |
| Other Priority | Indicate Y if (*AGE* >= 65 **or** DISABILITY\_IND = “Y\_DOC” **or** LEP\_IND = yes  **or** SKILLS\_DEFICIENT\_IND = yes **or** URBAN\_RURAL\_IND = “Rural”  **or** POOR\_EMP\_PROSPECTS\_IND = yes **or** FAILED\_TO\_FIND\_EMP\_IND = yes  **or** HOMELESS\_IND = yes **or** HOMELESS\_RISK\_IND = yes), else indicate N | |
| Minority | Indicate Y if (RACE\_AMERICAN\_INDIAN\_IND = yes **or** RACE\_ASIAN\_IND = yes  **or** RACE\_BLACK\_IND = yes **or** RACE\_PACIFIC\_IND = yes **or** ETHNICITY\_IND = yes),  else indicate N |
| Gender | GENDER |

## WAITING LIST

**(Waiting List)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | All persons who |
| APPLICATION DATE is valued | Have applied to the program |
| **AND**  ELIGIBILITY = Eligible | And have been determined eligible for the program |
| **AND**  *INITIAL ASSIGNMENT DATE* is null | And have not yet been given an assignment |
| **AND**  PLACED ON WAITING LIST = Yes | And have been placed on the waiting list |
| **AND**  NON-EXIT REASON FOR CLOSING RECORD ≠ "Withdrew application" | And have not withdrawn their application |

**Introduction:** List of all applicants who have ever had an enrollment with this grantee or sub-grantee where they were determined to be eligible for SCSEP and have been placed on a waiting list. They also have not been given an assignment and have not withdrawn their application. The date of eligibility determination, number of days on waiting list, demographic data and job interest codes are displayed.

**Instructions:**

**Date Filters**

There are two text boxes called “Eligibility Determination Date From" and "Eligibility Determination Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Eligibility Determination Date fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** DATE OF ELIGIBILITY DETERMINATION

Display “Eligibility Determination Date From” and “Eligibility Determination Date To” next to the associated Filter Date fields.

**Alpha-numeric Search field:** LAST NAME

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **Summary-level elements** | | |
| Number on Waiting List | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria | |
| Percent Veteran | **Percent** of Applicants where “Veteran” = Y (see below); show count in parentheses after percent | |
| Percent Other Priority | **Percent** of Applicants where “Other Priority” = Y (see below); show count in parentheses after percent |
| Percent Minority | **Percent** of Applicants where “Minority” = Y (see below); show count in parentheses after percent | |
| Percent Female | **Percent** of Applicants where GENDER = “Female”; show count in parentheses after percent |
| Average Days on Waiting List | **Sum** of “Days on Wait List“ for participants where DATE OF ELIGIBILITY DETERMINATION is valued **and** “Days on Wait List“ is valued and > 0  **divided by** “Number on Waiting List” | |
| **Detail-level elements** | | |
| Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) | |
| County of Residence | COUNTY | |
| Case Worker | CASE WORKER | |
| Eligibility Date | DATE OF ELIGIBILITY DETERMINATION | |
| Days on Wait List | *REPORT RUN DATE* **minus** DATE OF ELIGIBILITY DETERMINATION  **Note:** If value < 0, display no value **and** do not include in average. | |
| Veteran | Indicate Y if (VETERAN\_TEXT = “a\_Veteran” or “b\_Eligible\_spouse\_of\_veteran”), else indicate N | |
| Other Priority | Indicate Y if (*AGE* >= 65 **or** DISABILITY\_IND = “Y\_DOC” **or** LEP\_IND = yes  **or** SKILLS\_DEFICIENT\_IND = yes **or** URBAN\_RURAL\_IND = “Rural”  **or** POOR\_EMP\_PROSPECTS\_IND = yes **or** FAILED\_TO\_FIND\_EMP\_IND = yes  **or** HOMELESS\_IND = yes **or** HOMELESS\_RISK\_IND = yes), else indicate N | |
| Minority | Indicate Y if (RACE\_AMERICAN\_INDIAN\_IND = yes **or** RACE\_ASIAN\_IND = yes  **or** RACE\_BLACK\_IND = yes **or** RACE\_PACIFIC\_IND = yes **or** ETHNICITY\_IND = yes),  else indicate N | |
| Gender | GENDER | |
| Job Interest Code 1 | JOB\_INTEREST\_1 | |
| Job Interest Code 2 | JOB\_INTEREST\_2 | |
| Job Interest Code 3 | JOB\_INTEREST\_3 | |

# Group #2: PARTICIPANTS

## CURRENT/EXITED PARTICIPANTS

**(Current/Exited)**

**Selection Criteria**

Unless certain filters are used when the report is run (see below for details), include records that meet either set of selection criteria that follow.

“Current” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all enrollments where |
| *INITIAL ASSIGNMENT DATE* is valued | The participant has been assigned in the program |
| **AND**  DATE OF EXIT is null | And are current (not yet exited) |

“Exited” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all enrollments that |
| DATE OF EXIT is valued | Have exited the program |
| **AND**  EXIT DUE TO UNSUB PLACE = "Yes, Regular" or "Yes, Self"  **OR**  EXIT DUE TO UNSUB PLACE = No  **AND**  (OTHER REASON FOR EXIT is valued  **OR**  PY18\_EXIT\_REASON is valued) | Have answered whether or not they have exited due to unsubsidized employment **or** have answered whether there were other reasons for exit |

**Display Instructions:**

The selection criteria for this report operate on an enrollment level, but the display information is a mixture of participant-, enrollment-, and assignment-level information. For each participant, display the participant-level data, then the enrollment-level data for the “Current” enrollment (if any), as well as adding as many rows as are necessary to accommodate all of that enrollment’s assignments. Repeat this for each “Exited” enrollment the participant has, where those are sorted in descending chronological order by *ENROLLMENT DATE*. See Displayed Data Element Layout below for details.

**Introduction:** List of all participants and their enrollment(s) where there has been an assignment.

**Instructions:**

**Active Filters for enrollments**

There is an option called “Show Currently Active Enrollments Only”. If it is selected when the report is run, the report’s outcome will include only currently active enrollments.

There is an option called “Show Exited Enrollments Only”. If it is selected when the report is run, the report’s outcome will include only exited enrollments.

There is an option called “Show Current and Exited Enrollments”. If it is selected when the report is run, the report’s outcome will include both current and exited enrollments.

**Active Filters for assignments**

There is an option called “Show Current/Latest Assignments Only”. If it is selected when the report is run, the report’s outcome will include only the assignment for each displayed enrollment with the most recent Assignment Date.

There is an option called “Show All Assignments”. If it is selected when the report is run, the report’s outcome will include all assignments associated with each displayed enrollment.

**Date Filters for Initial Assignment Date**

There are two text boxes called "Initial Assignment Date From” and “Initial Assignment Date To". If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Initial Assignment Date falls within the date range.

**Date Filters for Exit Date**

There are two text boxes called "Exit Date From” and “Exit Date To". If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Exit Date falls within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Display this message centered at the top of the report in bold red letters:

**Please note, outstanding rejects may affect the accuracy of an individual’s current/exited status.**

Filters that limit the records by which set of Selection Criteria they meet

Display an option called “Show Currently Active Enrollments Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Current” Selection Criteria above.

Display another option called “Show Exited Enrollments Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Exited” Selection Criteria above.

Display another option called “Show Current and Exited Enrollments”. If this filter is selected when the report is run, display enrollments that satisfy both sets of Selection Criteria above.

Active Filter:

Record type: assignment (CSA)

Condition: assignment is the “Latest Assignment” for the enrollment

Display two options for the Active Filter labeled as “Show All Assignments” and "Show Current/Latest Assignments Only”. Do not apply the Active Filter when “Show All Assignments” is selected. Apply the Active Filter when only "Show Current/Latest Assignments Only” is selected when the report is run.

**Date Filters:**

|  |  |
| --- | --- |
| **(first) Filter Date field:** *INITIAL ASSIGNMENT DATE* | Display “Initial Assignment Date” or “Exit Date” next to the associated Filter Date fields that use the word “From” instead of “Starting Date” and “To” instead of “Ending Date”,  e.g., “Exit Date From (mm/dd/yyyy)”. |
| **(second) Filter Date field:** EXIT DATE |

**Collapsed Results Details option:**

Show a checkbox beneath the "Show Results Details" checkbox called "Display Participant Info with Links to Details”. If this box is checked when the report is run, then display only the “Participant” detail-level element for each participant that appears in the Results Details section. Make each Participant’s name a hyperlink that opens a pop-up window that includes all of that particular person’s detailed enrollment, assignment, and exit information.

If the "Display Participant Info with Links to Details” checkbox is ***not*** checked when the report is run, then display all of the details for the selected participants.

**Element Filters**

At the top of the report, display an option (e.g., a checkbox) for each report element that tells the report to display or not display that element when the user runs the report. Group these options into two sections, one for Summary- and the other for Detail-level elements. Also:

- if the “Show Results Summary” option is NOT selected, nullify and gray-out all options for displaying Summary-level report elements

- if the “Show Results Details” option is NOT selected, nullify and gray-out all options for displaying Detail-level report elements

Show collapse/expand buttons (in the form of + and – boxes, + meaning collapsed and – meaning expanded) next to the two sections of options, so that each one can be collapsed or expanded separately.

When these element filters are used, arrange the elements that are displayed such that there are no gaps, i.e., the “holes” of where the non-displayed elements would be, as best as possible.

**Detail Filters**

At the top of the report, display an option (e.g., a checkbox) for each of Enrollment, Assignment, and Exit, that tells the report to display or not display those sets of Detail-level report elements when the user runs the report.

Show collapse/expand buttons (in the form of + and – boxes, + meaning collapsed and – meaning expanded) next to “Enrollment Date,” “Assignment Date,” and “Exit Date,” so that each of their groupings of elements can be collapsed or expanded separately.

**Alpha-numeric Search field:** LAST NAME of the participant

This report is automatically generated by SPARQ and cannot be regenerated by users. See the Automatic Processes Specifications for frequency.

Display the date/time the report was last generated in the following formatted text, right-aligned near the top of the report:

Last Generated: mm/dd/yyyy hh:mm:ss XM

**Specifications for Displayed Data Elements**

Definitions:

“Latest Assignment” -- the assignment record for the enrollment with the latest ASSIGNMENT DATE

“Prior Assignment” -- any assignment record for the enrollment that is *not* the “Latest Assignment”

| **#** | **Summary-level elements** | |
| --- | --- | --- |
| 1 | Number of Current Participants | If the “Current” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display **count** of participants that have at least one enrollment that met the “Current” Selection Criteria. |
| 2 | Average Time in Program Since 7/1/2007 | Display “A mo / B d”  where  A = (**Average** of all *DAYS IN SCSEP DURATION*) **divided by** *NUMBER OF DAYS IN MONTH* (round this result to one decimal place)  B = (**Average** of all *DAYS IN SCSEP DURATION*) (round this result to one decimal place) |
| 3 | Average Time in [Grantee/Sub-Grantee] Since 7/1/2007  When running a grantee report, replace “[Grantee/Sub-Grantee]” with “Grantee” in the label.  When running a sub-grantee report, replace “[Grantee/Sub-Grantee]” with “Sub-Grantee” in the label. | Display “A mo / B d”  where  A = (**Average** of all *DAYS IN GS DURATION*) **divided by** *NUMBER OF DAYS IN MONTH* (round this result to one decimal place)  B = (**Average** of all *DAYS IN GS DURATION*) (round this result to one decimal place) |
| 4 | Average Time in SCSEP | Display “A mo / B d”  where  A = (**Average** of all *DAYS IN SCSEP*) **divided by** *NUMBER OF DAYS IN MONTH* (round this result to one decimal place)  B = (**Average** of all *DAYS IN SCSEP*) (round this result to one decimal place) |
| 5 | Number of Participants with More Than One Displayed Enrollment | **Count** of participants that have more than one enrollment that met the chosen Selection Criteria |
| 6 | Average Number of Enrollments per Participant | **Count** of enrollments that met the chosen Selection Criteria **divided by** **count** of participants that have at least one enrollment that met the chosen Selection Criteria (round this result to two decimal places) |
| 7 | Average Days in Current Enrollments | Display “N/A” if the “Exited” Selection Criteria was the only set of Selection Criteria applied when the report was run.  Else, **average** of “Days in Enrollment” for enrollments that met the “Current” Selection Criteria (round this result to nearest whole number) |
| 8 | Average Days in Displayed Enrollments | Display **Average** of “Days in Enrollment” (round this result to nearest whole number) |
| 9 | Average Number of Displayed Assignments per Enrollment | **Count** of assignments associated with enrollments that met the chosen Selection Criteria **divided by** **count** of enrollments that met the chosen Selection Criteria (round this result to two decimal places)  Limit the assignments counted in the numerator to only those that appear on the report according to the assignment-level Active Filter. |
| 10 | Average Days in Current Assignments | Display “N/A” if the “Exited” Selection Criteria was the only set of Selection Criteria applied when the report was run.  Else, using only Latest Assignments associated with enrollments that met the “Current” Selection Criteria, **average** of “Days in Assignment” (round this result to nearest whole number) |
| 11 | Average Days in Displayed Assignments | Display **Average** of “Days in Assignment” (round this result to nearest whole number) |
| 12 | Number of Exited Participants | If the “Exited” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display **count** of participants that have at least one enrollment that met the “Exited” Selection Criteria. |
| 13 | Percent Exiting For Employment | If the “Exited” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display: of all participants that have at least one enrollment that met the “Exited” Selection Criteria, the **percent** for whom there is an enrollment record where EXIT DUE TO UNSUBSIDIZED EMPLOYMENT? = “1\_Yes\_regular“ **or** “2\_Yes\_self” (round this result to one decimal place) |
| 14 | Percent Exiting For Other Reasons | If the “Exited” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display: of all participants that have at least one enrollment that met the “Exited” Selection Criteria, the percent for whom there is an enrollment record where OTHER REASON FOR EXIT =  “1\_Moved\_from\_area” or “2\_For\_cause” or “3\_Voluntary” or  “4\_Non-income\_eligible” or “5\_Durational\_limit” or “6\_Administrative\_reasons”  OR PY18\_EXIT\_REASON=  “1\_Moved\_from\_area” or “2\_For\_cause” or “3\_Voluntary” or  “4\_Durational\_limit”  (round this result to one decimal place) |
| 15 | Percent Excluded at Exit | If the “Exited” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display: of all participants that have at least one enrollment that met the “Exited” Selection Criteria, the **percent** for whom there is an enrollment record where OTHER REASON FOR EXIT =  “7\_Deceased” **or** “8\_Health/medical” **or** “9\_Family\_care” **or** “10\_Institutionalized”  **OR** PY18\_EXIT\_REASON=  “6\_Participants\_health/medical” **or** “7\_Institutionalized” **or** “8\_Reserve\_personnel\_called\_to\_active\_duty” **or**  “9\_Ineligible\_due\_to\_income\_at\_recertification”  (round this result to one decimal place) |
| 16 | Percent Excluded after Exit | If the “Exited” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display: of all participants that have at least one enrollment that met the “Exited” Selection Criteria, the **percent** for whom there is an enrollment record where “Exclusion Discovered After Exit” is valued (round this result to one decimal place) |
| 17 | Number of Participants Ever on Leave of Absence | **Count** of participants that have at least one enrollment that (met the chosen Selection Criteria **and** has at least one break where *LENGTH OF BREAK* ≠ 0) |
| 18 | Average Number of Leaves of Absence Per Enrollment | **Count** of breaks associated with enrollments that met the chosen Selection Criteria where *LENGTH OF BREAK* ≠ 0 **divided by count** of enrollments that met the chosen Selection Criteria **and** have at least one break where *LENGTH OF BREAK* ≠ 0 (round this result to two decimal places) |
| 19 | Average Days Ever on Leave of Absence | **Average** of “Days Ever on Leave of Absence” where “Days Ever on Leave of Absence” ≠0 (round this result to the nearest whole number) |
| **#** | **Participant-detail-level elements** | |
| 20 | Participant (label not displayed) | Format:  [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID]  [HOME PHONE NUMBER] [STREET], [CITY], [STATE] [ZIP CODE]  (where HOME PHONE NUMBER is formatted as “(###) ###-####” if it’s valued)  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, “Home Phone Number”, “Participant Street”, “Participant City”, “Participant State”, and “Participant Zip Code”, respectively.) |
| 21 | Time in Program Since 7/1/2007 | Display “A mo / B d”  where  A = *DAYS IN SCSEP DURATION* **divided by** *NUMBER OF DAYS IN* *MONTH* (round this result to one decimal place)  B = *DAYS IN SCSEP DURATION* |
| 22 | Time in [Grantee/Sub-Grantee] Since 7/1/2007  When running a grantee report, replace “[Grantee/Sub-Grantee]” with “Grantee” in the label.  When running a sub-grantee report, replace “[Grantee/Sub-Grantee]” with “Sub-Grantee” in the label. | Display “A mo / B d”  where  A = *DAYS IN GS DURATION* **divided by** *NUMBER OF DAYS IN* *MONTH* (round this result to one decimal place)  B = *DAYS IN GS DURATION* |
| 23 | Time in SCSEP | Display “A mo / B d”  where  A = *DAYS IN SCSEP* **divided by** *NUMBER OF DAYS IN* *MONTH* (round this result to one decimal place)  B = *DAYS IN SCSEP* |
| **#** | **Enrollment-detail-level elements** | |
| 24 | Enrollment Date | *ENROLLMENT DATE* |
| 25 | Application Date | APPLICATION\_DATE |
| 26 | County of Residence | COUNTY |
| 27 | Case Worker | CASE WORKER |
| 28 | Days in Enrollment | *LENGTH OF ENROLLMENT* |
| 29 | Initial Assignment Date | *INITIAL ASSIGNMENT DATE* |
| 30 | Days Ever on Leave of Absence | *ENROLLMENT BREAKS* |
| 31 | Days on Most Recent Leave of Absence | If the enrollment has no breaks, display “N/A”.  Else, for the break in this enrollment with the latest BREAK START DATE, display *LENGTH OF BREAK*. |
| 32 | Job Interest Code 1 | JOB INTEREST 1 |
| 33 | Job Interest Code 2 | JOB INTEREST 2 |
| 34 | Job Interest Code 3 | JOB INTEREST 3 |
| **#** | **Assignment-detail-level elements** | |
| 35 | Assignment Date | ASSIGNMENT DATE |
| 36 | Assignment Start Date | ASSIGNMENT START DATE |
| 37 | Assignment End Date | ASSIGNMENT END DATE |
| 38 | Days in Assignment | If (ASSIGNMENT START DATE is null **and** ASSIGNMENT END DATE is null **and** EXIT DATE is valued),  then display number of days between ASSIGNMENT DATE**and** EXIT DATE (inclusive).  Else:  If (ASSIGNMENT END DATE is null **and** EXIT DATE is null),  then display number of days between ASSIGNMENT DATE**and** *REPORT RUN DATE* (inclusive).  Else, display number of days between ASSIGNMENT DATE **and** ASSIGNMENT END DATE (inclusive). |
| 39 | Host Agency | ORGANIZATION NAME |
| 40 | Address | Format (values from organization’s address):  [STREET]  [CITY], [STATE] [ZIP CODE]  (In the export file, list these values in individual columns named “Host Agency Street”, “Host Agency City”, “Host Agency State”, and “Host Agency Zip Code”, respectively.) |
| 41 | Contact | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the CSA: First Name, Last Name, Phone Number, Email address  (In the export file, list these values in these columns:  [CONTACT FIRST NAME] [CONTACT LAST NAME] in “Contact Name”  [CONTACT PHONE] in “Contact Phone Number”  [CONTACT EMAIL] in “Contact E-mail”  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME] in “Supervisor Name”  [SUPERVISOR PHONE] in “Supervisor Phone Number”  [SUPERVISOR EMAIL] in “Supervisor E-mail”) |
| **#** | **Exit-detail-level elements** | |
| 42 | Exit Date | EXIT\_DATE |
| 43 | Exit for Unsubsidized Employment | Display “Y” if EXIT DUE TO UNSUBSIDIZED EMPLOYMENT? = “1\_Yes\_regular“ **or** “2\_Yes\_self”  Else display “N” |
| 44 | Subsequently Employed | Display “Y” if *INITIAL PLACEMENT START DATE* is valued **and** (OTHER REASON FOR EXIT =  “1\_Moved\_from\_area” **or** “2\_For\_cause” **or** “3\_Voluntary” **or**  “4\_Non-income\_eligible” **or** “5\_Durational\_limit” **or** “6\_Administrative\_reasons” **or**  “8\_Health/medical” **or** “9\_Family\_care” **or** “10\_Institutionalized”  **OR** PY18\_EXIT\_REASON=  “1\_Moved\_from\_area **or** “2\_For\_cause” **or** “3\_Voluntary” **or**  “4 Durational\_limit” **or** “6\_Participants\_health/medical **or**  “7 Institutionalized” **or** “8\_Reserve\_personnel\_called\_to\_active\_duty” **or**  “9 Ineligible\_due\_to\_income\_at\_recertification”)  Else display “N” if there are no UE records **and**  (OTHER REASON FOR EXIT =  “1\_Moved\_from\_area” **or** “2\_For\_cause” **or** “3\_Voluntary” **or**  “4\_Non-income\_eligible” **or** “5\_Durational\_limit” **or** “6\_Administrative\_reasons” **or**  “8\_Health/medical” **or** “9\_Family\_care” **or** “10\_Institutionalized”  **Or** PY18\_EXIT\_REASON=  “1\_Moved\_from\_area” **or** “2\_For\_cause” **or** “3\_Voluntary” **or**  “4\_Durational\_limit” **or** “6\_Participants\_health/medical” **or**  “7\_Institutionalized”  **or** “8\_Reserve\_personnel\_called\_to\_active\_duty” **or**  “9\_Ineligible\_due\_to\_income\_at\_recertification”) |
| 45 | Other Exit Reason | OTHER REASON FOR EXIT |
| 46 | PY18 Other Exit Reason | PY18\_EXIT\_REASON\_OTHER |
| 47 | Exclusion Discovered After Exit | If EXIT\_DATE >= 7/1/2018, then display “N/A”.  Else, display EXCLUSION AFTER EXIT |
| 48 | Date Exclusion After Exit Was Discovered | If EXIT\_DATE >= 7/1/2018, then display “N/A”.  Else, display EXCLUSION DATE |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Current Participants: [value] Number of Exited Participants: [value]

Average Time in Program Since 7/1/2007: [value] Percent Exiting For Employment: [value]

Average Time in [Grantee/Sub-Grantee] Since 7/1/2007: [value] Percent Exiting For Other Reasons: [value]

Average Time in SCSEP: [value] Percent Excluded at Exit: [value]

Number of Participants with More Than One Displayed Enrollment: [value] Percent Excluded after Exit: [value]

Average Number of Enrollments per Participant: [value] Number of Participants Ever on Leave of Absence: [value]

Average Days in Current Enrollments: [value] Average Number of Leaves of Absence Per Enrollment: [value]

Average Days in Displayed Enrollments: [value] Average Days Ever on Leave of Absence: [value]

Average Number of Displayed Assignments per Enrollment: [value]

Average Days in Current Assignments: [value]

Average Days in Displayed Assignments: [value]

**RESULTS DETAILS:**

**[Participant]**

Time in Program Since 7/1/2007: [value] Time in SCSEP: [value]

Time in [Grantee/Sub-Grantee] Since 7/1/2007: [value]

**Enrollment Date: [value]**

County of Residence: [value] Job Interest Code 1: [value]

Job Interest Code 2: [value]

Case Worker: [value] Job Interest Code 3: [value]

Days in Enrollment: [value]

Days Ever on Leave of Absence: [value]

Days on Most Recent Leave of Absence: [value]

**Latest Assignment**

**Assignment Date: [value]**

Assignment Start Date: [value] **Host Agency:** [value]

Assignment End Date: [value] Address: [value]

Days in Assignment: [value] [value]

Contact: [value]

[value]

[value]

[Repeat format for the next assignment under this enrollment, but under the different heading “Prior Assignments”.]

**Exit Date: [value]**

Exit for Unsubsidized Employment: [value] Exclusion Discovered After Exit: [value] PY18 Other Exit Reason: [value]

Subsequently Employed: [value] Date Exclusion After Exit Was Discovered: [value]

Other Exit Reason: [value] Entered Employment Achieved: [value]

[Repeat format for the next enrollment under this participant.]

[Repeat format for the next participant and its child records.]

## PRELIMINARY EMPLOYMENT RATE / MEDIAN EARNINGS

Let *PQ* be a constructed variable equal to the quarter of interest for the performance measure selected, defined as follows:

Set *PQ* = 2 is the user selects “Employment Rate – Second Quarter After Exit”

Set *PQ* = 3 if the user selects “Median Earnings”

Else, set *PQ* = 4.

Let *YTD\_IND* be a constructed variable defined as follows:

Set *YTD\_IND* = Y if the YTD radio button is checked when the report is run.

Else, set *YTD\_IND* = N.

Let *FDRP* be a constructed variable defined as follows:

If *YTD\_IND* = Y, set *FDRP* = the first day of the program year in which the selected program quarter resides.

Else, set *FDRP* = the first day of the selected program quarter.

Let *LDRP* be a constructed variable equal to the last day of the selected program quarter.

Let *FOLLOWUP STATUS* be an enrollment-level constructed variable defined by considering each enrollment’s UE assignments only, as follows:

**IF** *PQ* = 2

Set *FOLLOWUP STATUS* = “Successful Follow-up 1” **IF** there is a placement record for this enrollment where PY18\_FU\_1\_COMPLETED\_DATE is not null **AND** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental”.

Else Set *FOLLOWUP STATUS* = “Pending Follow-up 1” **IF** *RRD* <= *Q2FUED*

**AND** *RRD* < *FD3QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_1\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Overdue Follow-up 1” **IF** *RRD* <= *Q2FUED*

**AND** *RRD* >= *FD3QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_1\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Expired Follow-up 1” **IF** *RRD* > *Q2FUED*

**AND** *RRD* >= *FD3QAEQ*.

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_1\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Negative outcome(s) recorded” **IF** PY18\_FU\_1\_WAGES\_TEXT = “i\_No\_wages” for each placement record for this enrollment.

Else Set *FOLLOWUP STATUS* = “No UEs ever” **IF** *INITIAL PLACEMENT START DATE* is null for this enrollment.

Else Set *FOLLOWUP STATUS* = “No UEs lasting into 2nd quarter after exit” **IF** for each placement record associated with this enrollment: START\_DATE is on or after *FD3QAEQ* **OR** END\_DATE is before *FD2QAEQ*.

Else Set *FOLLOWUP STATUS* = “Other Reason”.

**IF** *PQ* = 3

Set *FOLLOWUP STATUS* = “Successful Follow-up 2” **IF** for each placement record associated with this enrollment:

PY18\_FU\_2\_COMPLETED\_DATE is not null

**AND** PY18\_FU\_2\_WAGES\_AMT > 0

**AND** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** ORG\_TYPE <> “Self-employment”

Else Set *FOLLOWUP STATUS* = “Pending Follow-up 2” **IF** *RRD* <= *Q2 WAGE FUED*

**AND** *RRD* < *FD4QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_2\_COMPLETED\_DATE is null

**AND** PY18\_FU\_1\_WAGES\_TEXT = ‘ii\_Yes\_supplemental”

**AND** ORG\_TYPE <> “Self-employment”

Else Set *FOLLOWUP STATUS* = “Overdue Follow-up 2” **IF** *RRD* <= *Q2 WAGE FUED*

**AND** *RRD* >= *FD4QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_2\_COMPLETED\_DATE is null

**AND** PY18\_FU\_1\_WAGES\_TEXT = ‘ii\_Yes\_supplemental”

**AND** ORG\_TYPE <> “Self-employment”

Else Set *FOLLOWUP STATUS* = “Expired Follow-up 2” **IF** *RRD* > *Q2 WAGE FUED*

**AND** *RRD* >= *FD4QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD3QAEQ*

**AND**

END\_DATE >= *FD2QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_2\_COMPLETED\_DATE is null

**AND** PY18\_FU\_1\_WAGES\_TEXT = ‘ii\_Yes\_supplemental”

**AND** ORG\_TYPE <> “Self-employment”

Else Set *FOLLOWUP STATUS* = “No UEs ever” **IF** *INITIAL PLACEMENT START DATE* is null for this enrollment.

Else Set *FOLLOWUP STATUS* = “No UEs lasting into 2nd quarter after exit” **IF** for each placement record associated with this enrollment: START\_DATE is on or after *FD3QAEQ* **OR** END\_DATE is before *FD2QAEQ*.

Else Set *FOLLOWUP STATUS* = “Other Reason”

**IF** *PQ* = 4

Set *FOLLOWUP STATUS* = “Successful Follow-up 3” **IF** there is a placement record for this enrollment where PY18\_FU\_3\_COMPLETED\_DATE is valued **AND** PY18\_FU\_3\_WAGES\_TEXT = “ii\_Yes\_supplemental”.

Else Set *FOLLOWUP STATUS* = “Pending Follow-up 3” **IF** *RRD* <= *Q4FUED*

**AND** *RRD* < *FD5QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_3\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD5QAEQ*

**AND**

END\_DATE >= *FD4QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_3\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Overdue Follow-up 3” **IF** *RRD* <= *Q4FUED*

**AND** *RRD* >= *FD5QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_3\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD5QAEQ*

**AND**

END\_DATE >= *FD4QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_3\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Expired Follow-up 3” **IF** *RRD* > *Q4FUED*

**AND** *RRD* >= *FD5QAEQ*

**AND** EXIT DATE is not null

**AND** NON EXIT REASON is null

**AND** there is no placement record for this enrollment **where** PY18\_FU\_3\_WAGES\_TEXT = “ii\_Yes\_supplemental”

**AND** there is a placement associated with the enrollment **where**

START\_DATE >= EXIT\_DATE

**AND** START\_DATE < *FD5QAEQ*

**AND**

END\_DATE >= *FD4QAEQ*

**OR** END\_DATE is null

**AND** PY18\_FU\_3\_COMPLETED\_DATE is null.

Else Set *FOLLOWUP STATUS* = “Negative outcome(s) recorded” **IF** PY18\_FU\_3\_WAGES\_TEXT = “i\_No\_wages” for each placement record for this enrollment.

Else Set *FOLLOWUP STATUS* = “No UEs ever” **IF** *INITIAL PLACEMENT START DATE* is null for this enrollment.

Else Set *FOLLOWUP STATUS* = “No UEs lasting into 4th quarter after exit” **IF** for each placement record associated with this enrollment: START\_DATE is on or after *FD5QAEQ* **OR** END\_DATE is before *FD4QAEQ*.

Else Set *FOLLOWUP STATUS* = “Other Reason”.

**Note:** a placement with no follow-up record should be considered the same way as a placement with null values for all relevant fields in the follow-up record.

**Selection Criteria**

“All Enrollments”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

“All Unsuccessful Enrollments”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And the person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |
| **AND**  *FOLLOWUP STATUS* begins with “Pending”  **OR**  *FOLLOWUP STATUS* begins with “Overdue”  **OR**  *FOLLOWUP STATUS* begins with “Expired”  **OR**  *FOLLOWUP STATUS* begins with “Negative”  **OR**  *FOLLOWUP STATUS* begins with “No”  **OR**  *FOLLOWUP STATUS* begins with “Other” | And there is an unsuccessful follow-up associated with the enrollment. |

“All Enrollments with negative outcomes”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And the person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |
| **AND**  *FOLLOWUP STATUS* begins with “Negative”  **OR**  *FOLLOWUP STATUS* begins with “No”  **OR**  *FOLLOWUP STATUS* begins with “Other” | And there is an unsuccessful follow-up associated with the enrollment. |

“Only Pending Follow-ups”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And the person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |
| **AND**  *FOLLOWUP STATUS* begins with “Pending” | And there is a pending follow-up associated with the enrollment. |

“Only Overdue Follow-ups”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And the person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |
| **AND**  *FOLLOWUP STATUS* begins with “Overdue” | And there is an overdue follow-up associated with the enrollment. |

“Only Expired Follow-ups”

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants where |
| *FDNQAEQ* is between *FDRP* and *LDRP* (inclusive) where [N] = *PQ* | the relevant quarter after exit is within the selected report period |
| **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | And the enrollment has not been excluded from the performance measures |
| **AND** NON\_EXIT\_REASON is null | And a non-exit reason has not been indicated |
| **AND**  There is no placement record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | And the person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |
| **AND**  *FOLLOWUP STATUS* begins with “Expired” | And there is an expired follow-up associated with the enrollment. |

**Introduction:** For the measure of the user’s choosing, List of all enrollments that could be counted in the preliminary median earnings or employment rate where the relevant quarter after exit is within the selected report period.

The following note is displayed if the user generates the report for the median earnings measure:

**Note: CAUTION: Although the Median Earnings measure is not effective for Quarter 1 PY18, the Results Detail section is returning records for that quarter when the YTD option is selected. Those records should be ignored.**

**Instructions:**

**Multiple Sub-Grantee Selection**

Multiple sub-grantees can be selected by holding down the Ctrl button and highlighting the desired sub-grantees. If multiple sub-grantees are selected when the report is run, the report’s outcome will include all records associated with any of the selected sub-grantees.

**Measure Selection**

There are 3 radio buttons, one for each of the following 3 measures:

Employment Rate: Second Quarter After Exit

Median Earnings: Second Quarter After Exit

Employment Rate: Fourth Quarter After Exit

A user must select one of the 3 measures in order to run the report. No more than one measure can be selected at a time. The chosen measure will impact the enrollments/calculations included in the report, as indicated below.

**Follow-up Status Selection**

There are 6 radio buttons, one for each of the following 6 choices:

Show All Enrollments

Show All Unsuccessful Enrollments

Show All Unsuccessful Enrollments with negative outcomes

Show Only Pending Follow-ups

Show Only Overdue Follow-ups

Show Only Expired Follow-ups

The user must select one of these buttons in order to run the report. This choice will dictate which selection criteria is used for the report. The statuses of enrollments are as follows:

Successful Follow-up – Enrollment will be counted in the selected measure.

Pending Follow-up – A placement associated with the enrollment has a follow-up pending.

Overdue Follow-up – A placement associated with the enrollment has a follow-up that is past due.

Expired Follow-up – A placement associated with the enrollment has a follow-up that has expired.

Negative Outcome – All placements associated with the enrollment indicated no wages.

No UE lasting into quarter after exit – All placements associated with the enrollment were not active during the relevant quarter.

No UE ever – there are no placements associated with this enrollment.

Other Reason – The enrollment was not counted toward performance for a reason other than the ones listed.

**Report Period Selection**

There is a drop-down menu labeled “Program Quarter” for Employment Rate: Second Quarter After Exit and Employment Rate: Fourth Quarter After Exit containing every program quarter beginning with Q1PY18 and ending with the current quarter. For Median Earnings: Second Quarter After Exit, there is a drop-down menu labeled “Program Quarter” containing every program quarter beginning with Q2PY18 and ending with the current quarter. The quarter values are displayed in the format: Q[X]PY[YY] where X is the numeric quarter value and YY is the last two digits of the program year. A user must select a program quarter in order to run the report.

There is also a radio button labeled “Year to date” which the user can select in order to change the report period from Quarter (default) to YTD.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

**If selected measure = “Employment rate: 2nd quarter after exit” or “Employment rate: 4th quarter after exit”:**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of enrollments | **Count** of enrollments that meet the selection criteria for the selected report period |
| 2 | Number employed during the quarter of interest | **IF** user selects “Show All Enrollments”, display:  **Count** of enrollments that meet the selection criteria for the selected report period **where** *FOLLOWUP STATUS* begins with “Successful”  **ELSE** display “N/A” |
| 3 | Preliminary Employment Rate | **IF** user selects “Show All Enrollments”, display:  **Count** of enrollments that meet the selection criteria for the selected report period **where** *FOLLOWUP STATUS* begins with “Successful”  **Divided by**  **Count** of enrollments that meet the selection criteria for the selected report period  **ELSE** display “N/A” |
| 4 | Enrollments not currently counted in employment rate due to an undone follow-up | **Count** of enrollments that meet the selection criteria for the selected report period **where**:  *FOLLOWUP STATUS* begins with “Pending”  **OR**  *FOLLOWUP STATUS* begins with “Overdue” |
| 5 | Enrollments not currently counted in employment rate due to negative reasons | **Count** of enrollments that meet the selection criteria for the selected report period **where**:  *FOLLOWUP STATUS* begins with “Expired”  **OR**  *FOLLOWUP STATUS* begins with “Negative”  **OR**  *FOLLOWUP STATUS* begins with “No”  **OR**  *FOLLOWUP STATUS* begins with “Other” |

**If selected measure = “Median earnings in 2nd quarter after exit”:**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of enrollments | **Count** of enrollments that meet the selection criteria for the selected report period |
| 2 | Median earnings | **IF** user selects “Show All Enrollments”, display:  **Median** of the sum of all PY18\_FU\_2\_WAGES\_AMT for placements associated with enrollments that meet the selection criteria for the selected report period with at least one placement record where PY18\_FU\_1\_COMPLETED\_DATE is not null **AND** PY18\_FU\_1\_WAGES\_TEXT = “ii\_Yes\_supplemental” **AND**  EXIT\_DATE >= 1/1/2018  **Note:** For placements where PY18\_FU\_2\_WAGES\_AMT is null, the PY18\_FU\_2\_WAGES\_AMT should be treated as valued zero (0) for this calculation  **Note:** Express result as a number (with two decimal places). If the count of enrollments is even, display the average of the two median values  **ELSE** display“N/A” |
| 3 | Enrollments not currently counted in measure due to an undone follow-up | **Count** of enrollments that meet the selection criteria for the selected report period **where**:  *FOLLOWUP STATUS* begins with “Pending”  **OR**  *FOLLOWUP STATUS* begins with “Overdue” |
| 4 | Enrollments not currently counted in measure due to other reasons | **Count** of enrollments that meet the selection criteria for the selected report period **where**:  *FOLLOWUP STATUS* begins with “Expired”  **OR**  *FOLLOWUP STATUS* begins with “Negative”  **OR**  *FOLLOWUP STATUS* begins with “No”  **OR**  *FOLLOWUP STATUS* begins with “Other” |

The detail section contains one record for each UE placement associated with an enrollment.

|  |  |  |
| --- | --- | --- |
| **Detail-level elements** | | **Selected Measure** |
| 1 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 2 | County of Residence | COUNTY |
| 3 | Case Worker | CASE WORKER |
| 4 | Exit Date | EXIT\_DATE |
| 5 | Quarter in which Participant Would Be Counted | **If** *PQ* = 2, Display the 2nd quarter after the exit quarter for the enrollment  **Else If** *PQ* = 3, Display the 3rd quarter after the exit quarter for the enrollment  **Else** Display the 4th quarter after the exit quarter for the enrollment.  Format: Q[X]PY[YY] **where** X is the numeric quarter value and YY is the last two digits of the program year. |
| 6 | Status of Enrollment | *FOLLOWUP STATUS* |
| 7 | Indent the next headings and list on separate rows |  |
| 8 | Employer | ORGANIZATION NAME |
| 9 | ID | ORG\_ID |
| 10 | Address | Format (values from organization’s address):  [STREET]  [CITY], [STATE] [ZIP CODE] |
| 11 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the placement: First Name, Last Name, Phone Number, Email address |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

If selected measure = “Employment rate: 2nd quarter after exit” or “Employment rate: 4th quarter after exit”:

|  |  |
| --- | --- |
| Number of enrollments: | [value] |
| Number employed during the quarter of interest: | [value] |
| Preliminary Employment Rate: | [value] |
| Enrollments not currently counted in employment rate due to an undone follow-up: | [value] |
| Enrollments not currently counted in employment rate due to negative reasons: | [value] |

If selected measure = “Median earnings in 2nd quarter after exit”:

|  |  |
| --- | --- |
| Number of enrollments: | [value] |
| Median earnings: | [value] |
| Enrollments not currently counted in measure due to an undone follow-up: | [value] |
| Enrollments not currently counted in measure due to other reasons: | [value] |

**RESULTS DETAILS:**

**[LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER]**

|  |  |  |  |
| --- | --- | --- | --- |
| County of Residence: | [value] | Employer: | [value] |
| Case Worker: | [value] | ID: | [value] |
| Exit Date: | [value] | Address: | [value] |
| Quarter in which Participant Would Be Counted: | [value] | Contact: | [value] |
| Follow-up Status: | [value] |  |  |

## PARTICIPANTS WHO HAVE STARTED EMPLOYMENT BUT NOT YET ACHIEVED ENTERED EMPLOYMENT

**(Started Employment)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants who |
| There is a UE record that has a pending followup (See specification for pending followup below) | There is a Follow-up 1 pending |
| **AND**  The first quarter after exit is within the selected report period | And the first quarter after exit is within the report period. |
| OR | Or |
| *INITIAL PLACEMENT START DATE* is valued | The person has exited and has at least one unsubsidized employment |
| The first quarter after exit is within the selected report period | And the period in which the person could start a new job was within the selected report period |
| **AND**  there is no UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = “YES” | And Entered Employment has not yet been achieved with any employer thus far |
| **AND**  *EXCLUDED* = “No” | And the enrollment is not excluded |
| **AND**  NON\_EXIT\_REASON is null | And the enrollment was not closed due to a non-exit reason. |
| **AND**  There is no UE record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” and  START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

**Introduction:** List of all participants who have started unsubsidized employment but have not yet achieved Common Measures Entered Employment this quarter.

**Instructions:**

**Multiple Sub-Grantee Selection**

Multiple sub-grantees can be selected by holding down the Ctrl button and highlighting the desired sub-grantees. If multiple sub-grantees are selected when the report is run, the report’s outcome will include all records associated with any of the selected sub-grantees.

**Report Period Dropdowns**

There are two drop down menus labeled “Quarter” and “Program Year” next to the “Show Results Summary” and the “Show Results Details” checkboxes. If the “Quarter” option is selected when the report is run, the report’s outcome will include records where the first quarter after exit is within the selected quarter. If the “Program Year” option is selected when the report is run, the report’s outcome will include records where the first quarter after exit is within the selected program year. You cannot use the “Quarter” and “Program Year” options simultaneously.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** EXIT DATE

Display “Exit Date From” and “Exit Date To” next to the associated Filter Date fields, e.g., “Exit Date From (mm/dd/yyyy)”.

**Report Quarter Filter**

Display a drop down menu labeled “Quarter” with the following options: Q1, Q2, Q3, Q4. When a user selects one of these quarters and runs the report, display all enrollments where the first quarter after exit is within the selected quarter of the current program year. If no quarter is selected when the report is run, display all enrollments where the first quarter after exit is within the quarter in which *REPORT RUN DATE* falls

**Program Year Filter**

Display a drop down menu labeled “Program Year” with all program years after 2007 minus the current program year. When a user selects one of these years and runs the report, display all enrollments where the first quarter after exit is within the selected program year. If no quarter is selected when the report is run, display all enrollments where the first quarter after exit is within the quarter in which *REPORT RUN DATE* falls

If the Quarter Filter and the Program Year filter are valued when the report is run, display the following error message:

**The two filters cannot be used simultaneously. Please unselect one of the filters**.

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Participants Affecting Entered Employment in the Selected Period | Count of Participants associated with an enrollment that meets the selection criteria **and** where that enrollment’s 1st quarter after the exit quarter is within the selected report period  **Note:** This is a count of participants. If a participant has more than one UE or enrollment record that meets the selection criteria, even if those UE records are associated with different enrollments, the participant should only be counted once. |
| 2 | Number of Participants Affecting Entered Employment After the Selected Period | Count of Participants associated with an enrollment that meets the selection criteria **and** where that enrollment’s 1st quarter after the exit quarter is on or after the selected report period  **Note:** This is a count of participants. If a participant has more than one UE or enrollment record that meets the selection criteria, even if those UE records are associated with different enrollments, the participant should only be counted once. |
| 3 | Preliminary Entered Employment Rate (Q) | The Q rate of the “Entered Employment Numerator” calculated below **divided by** the Q rate of the “Entered Employment Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria.  If “Program Year” option is selected when report is run, display “Not applicable”. |
| 4 | Preliminary Entered Employment Rate (YTD) | The YTD rate of the “Entered Employment Numerator” calculated below **divided by** the YTD rate of the “Entered Employment Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| 5 | Preliminary Entered Employment Rate (L4Q) | The L4Q rate of the “Entered Employment Numerator” calculated below **divided by** the L4Q rate of the “Entered Employment Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria.  If “Program Year” option is selected when report is run, display “Not applicable”. |
| # | **Detail-level elements** | |
| 6 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 7 | County of Residence | COUNTY |
| 8 | Case Worker | CASE WORKER |
| 9 | Exit Date | EXIT\_DATE |
| 10 | Quarter in Which Participant Will Be Counted | Display the 1st Quarter after the Exit Quarter for the enrollment  The Quarter is displayed in the following format: “Q[X]PY[YY]” where [X] is the quarter number and [YY] is the last two digits of the program year. |
| 11 | Date Participant Will Be Eligible to be Counted for Entered Employment | *FD1QAEQ* |
| 12 | Days Remaining Before Record Counts as Failure for Entered Employment Rate | Last day of the first Quarter after Exit Quarter minus *REPORT RUN DATE*  **Note:** if value < 0, display no value. |
| 13 | Current Employment Start Date | Earliest PLACEMENT START DATE where the UE has a null PLACEMENT END DATE, leave blank if all UEs have valued PLACEMENT END DATES |
| 14 | Reason for Lack of Entered Employment Credit | Indicate “Pending follow-up 1” if  there is a UE record for this enrollment that meets the selection criteria for Follow-up 1  Else indicate “Negative outcome(s) recorded” if  FIRST\_QTR\_WAGES\_TEXT = “i\_No\_wages” **or** “vii\_Unable” for each UE record for this enrollment  Else indicate “Follow-up 1 with no wage data” if  there is a UE record for this enrollment where  FIRST\_QTR\_FU\_COMPLETED\_DATE is valued  **AND**  FIRST\_QTR\_WAGES\_TEXT is null  Else indicate “No UEs during 1st quarter after exit” if  START\_DATE is on or after *FD2QAEQ* **or** END\_DATE is before *FD1QAEQ* for each UE record for this enrollment  Else indicate “Other” |
| 15 | Indent the next headings and list on separate rows |  |
| 16 | Employer | ORGANIZATION NAME |
| 17 | ID | ORG\_ID |
| 18 | Address | Format (values from organization’s address):  [STREET]  [CITY], [STATE] [ZIP CODE] |
| 19 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |
|  |  |  |

**Note:** The individual UE records should be clustered with the associated participant record.

|  |  |  |
| --- | --- | --- |
| **Pending Followup Specification** | | |
| **#** | Specification: | **Annotation:** |
|  | List of all placement (UE) records **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The person has exited from the program |
| **2** | **AND**  START\_DATE >= EXIT\_DATE | The placement has started on or after the exit date |
| **3** | **AND**  START\_DATE < *FD2QAEQ* | The placement started before the first day of the second quarter after exit quarter |
| **4** | **AND**  END\_DATE >= *FD1QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or will end after the first day of the first quarter after exit quarter |
| **5** | **AND**  FIRST\_QTR\_FU\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 1 |
| **6** | **AND**  There is no UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* | The participant does not already have a successful follow-up 1 |
| **7** | **AND**  *EXCLUDED* = “No” | The enrollment has not been excluded from the performance measures |
| **8** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **9** | **AND**  There is no UE record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **10** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

|  |  |
| --- | --- |
| **Entered Employment Numerator** | **Entered Employment Denominator** |
| Count of enrollments **where** | Count of enrollments **where** |
| **For Q count:**  The 1st Quarter after the Exit Quarter for the enrollment is within the selected report period  **For YTD count:**  The 1st Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s program year  **AND**  the 1st Quarter after the Exit Quarter for the enrollment is within the selected report period**or** a quarter prior to  **For L4Q count:**  The 1st Quarter after the Exit Quarter for the enrollment is within the selected report period**or** the three quarters prior to | **(repeat spec to left)** |
| **AND**  this enrollment has a UE record where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* |  |
| **AND**  NON\_EXIT\_REASON is null | **(repeat spec to left)** |
| **AND**  there is no UE record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and**  START\_DATE >= EXIT\_DATE | **(repeat spec to left)** |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” | **(repeat spec to left)** |
| **AND**  PRIOR\_EMP\_TYPE\_TEXT = “002\_Employed-but-with-notice-of-termination” **or** “003\_Not employed” | **(repeat spec to left)** |
| **AND**  *EXCLUDED* = “No” | **(repeat spec to left)** |

## PARTICIPANTS WHO HAVE ACHIEVED ENTERED EMPLOYMENT BUT NOT YET ACHIEVED RETENTION

**(Entered Employment)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants who |
| There is a UE record that meets the [selection criteria for Follow-up 2](#FU2) | There is a Follow-up 2 that can be done for the participant |
| **OR** | Or |
| *INITIAL PLACEMENT START DATE* is valued | The person has exited and has unsubsidized employment |
| **AND**  *REPORT RUN DATE* < *FD5QAEQ* | And there is still time for the participant to achieve retention within the fourth quarter after exit |
| **AND**  there is a UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* | And Entered Employment has been achieved |
| **AND**  *EXCLUDED* = “No” | And the enrollment has not been excluded from the performance measures |
| **AND**  [  there is no UE for this enrollment where  SECOND\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  there is no UE for this enrollment where  THIRD\_QTR\_WAGES\_TEXT = *“YES”*  ] | And Retention has not yet been achieved |

**Introduction:** List of all participants who have achieved Common Measures Entered Employment but have not yet achieved Retention this quarter.

**Instructions:**

**Multiple Sub-Grantee Selection**

Multiple sub-grantees can be selected by holding down the Ctrl button and highlighting the desired sub-grantees. If multiple sub-grantees are selected when the report is run, the report’s outcome will include all records associated with any of the selected sub-grantees.

**Date Filters**

There are two text boxes called "Exit Date From" and "Exit Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Exit Date fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** EXIT DATE

Display “ExitDate From” and “ExitDate To” next to the associated Filter Date fields, e.g., “ExitDate From (mm/dd/yyyy)”.

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| # | **Summary-level elements** | |
| 2 | Number of Participants affecting Retention after this quarter | Count of Participants associated with an enrollment that meets the selection criteria **and** where that enrollment’s 4th quarter after the exit quarter is *after* the *REPORT RUN DATE*’s quarter  **Note:** This is a count of participants. If a participant has more than one UE or enrollment record that meets the selection criteria, even if those UE records are associated with different enrollments, the participant should only be counted once. |
| 3 | Preliminary Retention Rate (Q) | The Q rate of the “Retention Numerator” calculated below **divided by** the Q rate of the “Retention Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| 4 | Preliminary Retention Rate (YTD) | The YTD rate of the “Retention Numerator” calculated below **divided by** the YTD rate of the “Retention Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| 5 | Preliminary Retention Rate (L4Q) | The L4Q rate of the “Retention Numerator” calculated below **divided by** the L4Q rate of the “Retention Denominator” calculated below, expressed as a percent rounded to one decimal place  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| # | **Detail-level elements** | |
| 6 | Participant (label not displayed) | Format:  [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUM] (if valued, formatted as “(###) ###-####”) |
| 7 | County of Residence | COUNTY |
| 8 | Case Worker | CASE WORKER |
| 9 | Exit Date | EXIT DATE |
| 10 | Date Participant Will Be Eligible to Be Counted for Retention | *FD4QAEQ* |
| 11 | Days Remaining Before Record Counts as Failure for Retention Rate | Last day of the fourth Quarter after Exit Quarter minus *REPORT RUN DATE*  **Note**: if value < 0, display no value **and** do not include in average |
| 12 | Current Employment Start Date | Earliest PLACEMENT START DATE where the UE has a null PLACEMENT END DATE, leave blank if all UEs have valued PLACEMENT END DATES |
| 13 | Reason for lack of retention credit | Indicate “Pending follow-up 2” if  there is a UE record for this enrollment that meets the selection criteria for Follow-up 2  Else indicate “Negative outcome(s) recorded” if  SECOND\_QTR\_WAGES\_TEXT = “i\_No\_wages” **or** “vii\_Unable” for each UE record for this enrollment  **AND**  THIRD\_QTR\_WAGES\_TEXT = “i\_No\_wages” **or** “vii\_Unable” for each UE record for this enrollment  Else indicate “2nd quarter wages only” if  there is a UE record for this enrollment where SECOND\_QTR\_WAGES\_TEXT = *“YES”*  **AND**  THIRD\_QTR\_WAGES\_TEXT = “i\_No\_wages” **or** “vii\_Unable” **or** is null for each UE record for this enrollment)  Else indicate “3rd quarter wages only” if  there is a UE record for this enrollment where THIRD\_QTR\_WAGES\_TEXT = *“YES”*  **AND**  SECOND\_QTR\_WAGES\_TEXT = “i\_No\_wages” **or** “vii\_Unable” **or** is null for each UE record for this enrollment)  Else indicate “Follow-up 2 with no wage data” if  there is a UE record for this enrollment where  SECOND\_THIRD\_QTR\_FU\_COMPLETED\_DATE is valued  **AND**  SECOND\_QTR\_WAGES\_TEXT is null  **AND**  THIRD\_QTR\_WAGES\_TEXT is null |
| 14 | Reason for lack of retention credit (continued) | Else indicate “No UEs during 2nd quarter after exit” if  START\_DATE is on or after *FD3QAEQ* **or** END\_DATE is before *FD2QAEQ* for each UE record for this enrollment  Else indicate “No UEs during 3rd quarter after exit” if  START\_DATE is on or after *FD4QAEQ* **or** END\_DATE is before *FD3QAEQ* for each UE record for this enrollment  Else indicate “Other” |
| 15 | Employer | ORGANIZATION NAME |
| 16 | ID | ORG\_ID |
| 17 | Address | Format (values from organization’s address):  [STREET]  [CITY], [STATE] [ZIP CODE] |
| 18 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |

Note: The individual UE records should be clustered with the associated participant record.

|  |  |
| --- | --- |
| **Retention Numerator** | **Retention Denominator** |
| Count of enrollments **where** | Count of enrollments **where** |
| **For Q count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter  **For YTD count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s program year  **AND**  the 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter **or** a quarter prior to it  **For L4Q count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter **or** the three quarters prior to it | **(repeat spec to left)** |
| **AND**  this enrollment has a UE record where  FIRST\_QTR\_WAGES\_TEXT = *“YES”*  **AND**  this enrollment has a UE record where  SECOND\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If SECOND\_QTR\_WAGES\_TEXT = null, SECOND\_QTR\_WAGES\_AMT > 0  **AND**  this enrollment has a UE record where  THIRD\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If THIRD\_QTR\_WAGES\_TEXT = null, THIRD\_QTR\_WAGES\_AMT > 0 | **AND**  this enrollment has a UE record where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* |
| **AND**  there is no UE record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and**  START\_DATE >= EXIT\_DATE | **(repeat spec to left)** |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” | **(repeat spec to left)** |
| **AND**  *EXCLUDED* = “No” | **(repeat spec to left)** |

## PARTICIPANTS WHO HAVE ACHIEVED ENTERED EMPLOYMENT BUT NOT YET ACHIEVED RETENTION AT 1 YEAR

**(Entered Employment II)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all participants who |
| There is a UE record that meets the [selection criteria for Follow-up 3](#FU3) | There is a Follow-up 3 that can be done for the participant |
| **OR** | Or |
| *INITIAL PLACEMENT START DATE* is valued | The person has exited and has unsubsidized employment |
| **AND**  *REPORT RUN DATE* < *FD5QAEQ* | And there is still time for the participant to achieve Retention at 1 Year within the fourth quarter after exit |
| **AND**  there is a UE record for this enrollment where  FIRST QTR WAGES TEXT = *“YES”* | And Entered Employment has been achieved |
| **AND**  *EXCLUDED* = “No”  **AND**  EXCLUSION DATE is null **or** >= *FD5QAEQ*  **AND**  there is no UE for this enrollment where  FOURTH QTR WAGES TEXT = “viii\_Excluded“ | And the enrollment has not been excluded from the performance measures |
| **AND**  there is no UE for this enrollment where  FOURTH QTR WAGES TEXT = *“YES”* | And Retention at 1 Year has not yet been achieved |

**Introduction:** List of all participants who have achieved Common Measures Entered Employment but have not yet achieved Retention at 1 Year within four quarters after exiting for this quarter. The date the participant will be eligible for Retention at 1 Year, the number of days remaining before the record counts as a failure for Retention at 1 Year, the placement start date for the current employer (field labeled Start Current Employ) and employer information are displayed.

**Instructions:**

**Date Filters**

There are two text boxes called "Starting Date" and "Ending Date" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Exit Date fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search field,” from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** EXIT DATE

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

| **Summary-level elements** | |
| --- | --- |
| Number of Participants Affecting Retention at 1 Year This Quarter | **Count** of Participants associated with an enrollment that meets the selection criteria **and** where that enrollment’s 4th quarter after the exit quarter is *within* the *REPORT RUN DATE*’s quarter  **Note:** This is a count of participants. If a participant has more than one UE or enrollment record that meets the selection criteria, even if those UE records are associated with different enrollments, the participant should only be counted once. |
| Number of Participants Affecting Retention at 1 Year After This Quarter | **Count** of Participants associated with an enrollment that meets the selection criteria **and** where that enrollment’s 4th quarter after the exit quarter is *after* the *REPORT RUN DATE*’s quarter  **Note:** This is a count of participants. If a participant has more than one UE or enrollment record that meets the selection criteria, even if those UE records are associated with different enrollments, the participant should only be counted once. |
| Preliminary Retention at 1 Year Rate (Q) | The Q rate of the “Retention at 1 Year Numerator” calculated below **divided by** the Q rate of the “Retention at 1 Year Denominator” calculated below, expressed as a percent rounded to one decimal place.  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| Preliminary Retention at 1 Year Rate (YTD) | The YTD rate of the “Retention at 1 Year Numerator” calculated below **divided by** the YTD rate of the “Retention at 1 Year Denominator” calculated below, expressed as a percent rounded to one decimal place.  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| Preliminary Retention at 1 Year Rate (L4Q) | The L4Q rate of the “Retention at 1 Year Numerator” calculated below **divided by** the L4Q rate of the “Retention at 1 Year Denominator” calculated below, expressed as a percent rounded to one decimal place.  Next to the rate, show the numerator and denominator counts in this format:  “([numerator]/[denominator])”  **Note:** This calculation is drawn from **all** enrollments associated with the selected grantee/sub-grantee, not just the enrollments that meet the selection criteria. |
| **Detail-level elements** | |
| Participant (label not displayed) | Format:  [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUM] (if valued, formatted as “(###) ###-####”)  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, and “Home Phone Number”, respectively.) |
| County of Residence | COUNTY |
| Case Worker | CASE WORKER |
| Exit Date | EXIT DATE |
| Date Participant Will Be Eligible to Be Counted for Retention at 1 Year | *FD4QAEQ* |
| Days Remaining Before Record Counts as Failure for Retention at 1 Year Rate | Last day of the fourth Quarter after Exit Quarter **minus** *REPORT RUN DATE*  **Note**: if value < 0, display no value **and** do not include in average |
| Start Current Employ | Earliest PLACEMENT START DATE where the UE has a null PLACEMENT END DATE, leave blank if all UEs have valued PLACEMENT END DATES |
| Reason For Lack of Retention at 1 Year Credit | Indicate “Pending follow-up 3” if  there is a UE record for this enrollment that meets the selection criteria for Follow-up 3  Else indicate “Negative outcome(s) recorded” if  FOURTH QTR WAGES TEXT = “i\_No\_wages” **or** “vii\_Unable” for each UE record for this enrollment  Else indicate “No UEs during 4th quarter after exit” if  START DATE >= *FD5QAEQ* **or** END DATE < *FD4QAEQ* for each UE record for this enrollment  Else indicate “Other” |
| Employer | ORGANIZATION NAME |
| ID | ORG ID |
| Address | Format (values from organization’s address):  [STREET]  [CITY], [STATE] [ZIP CODE] |
| Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |

**Note:** The individual UE records should be clustered with the associated participant record.

|  |  |
| --- | --- |
| **Retention at 1 Year Numerator** | **Retention at 1 Year Denominator** |
| Count of enrollments **where** | Count of enrollments **where** |
| **For Q count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter  **For YTD count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s program year  **AND**  the 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter **or** a quarter prior to it  **For L4Q count:**  The 4th Quarter after the Exit Quarter for the enrollment is within the *REPORT RUN DATE*’s quarter **or** the three quarters prior to it | **(repeat spec to left)** |
| **AND**  this enrollment has a UE record where  FIRST QTR WAGES TEXT = *“YES”* | **(repeat spec to left)** |
| **AND**  this enrollment has a UE record where  FOURTH QTR WAGES TEXT = *“YES”* |  |
| **AND**  there is no UE record for this enrollment where  SCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and**  START DATE >= EXIT\_DATE | **(repeat spec to left)** |
| **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” | **(repeat spec to left)** |
| **AND**  *EXCLUDED* = “No”  **AND**  EXCLUSION DATE is null **or** >= *FD5QAEQ*  **AND**  there is no UE for this enrollment where  FOURTH QTR WAGES TEXT = “viii\_Excluded“ | **(repeat spec to left)** |

## WAIVER OF DURATIONAL LIMIT

**(WDL)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all participants that have an enrollment for the selected grantee/sub-grantee **where** | List of all enrollments where |
| *DAYS LEFT* is between0 and 396 (inclusive) | The participant has been enrolled in SCSEP for at least three (3) years since July 1, 2007 |
| **AND**  *INITIAL ASSIGNMENT DATE* is valued | And has been given an assignment |
| **AND**  EXIT DATE is null | and is currently active |

**Introduction:** List of all participants who are one year or less away from reaching the lifetime durational limit in SCSEP participation, organized into separate sections by groupings of three months. The date expected to reach the durational limit, some demographic information, and the seven waiver factors are displayed.

**Instructions:**

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Display Instructions:** Each **participant** that has at least one enrollment that meets the Selection Criteria should appear on the report for the selected grantee/sub-grantee exactly once. For each participant that has *more than one* enrollment that meet the Selection Criteria, display only the enrollment with the latest *ENROLLMENT DATE*. If the participant has any enrollments that meet the Selection Criteria where EXIT DATE is null, ***of them***, display the one that has the latest *ENROLLMENT DATE*. (When finding the “latest *ENROLLMENT DATE*”, values should be considered before nulls.

**Sort order:**

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name).

2. Within each sub-grantee, group records into clusters defined as follows with the respective Type, and arrange the clusters in the same order:

Type Criteria

Participants 1 Quarter From Durational Limit *DAYS LEFT* between 0 and 91 (inclusive)

Participants 2 Quarters From Durational Limit *DAYS LEFT* between 92 and 182 (inclusive)

Participants 3 Quarters From Durational Limit *DAYS LEFT* between 183 and 273 (inclusive)

Participants 4 Quarters From Durational Limit *DAYS LEFT* between 274 and 365 (inclusive)

Type Criteria

Participants within 30 days of Durational Limit *DAYS LEFT* between 0 and 30 (inclusive)

Participants between 30 and 45 days from Durational Limit *DAYS LEFT* between 31 and 45 (inclusive)

Participants between 46 days and 3 months from Durational Limit *DAYS LEFT* between 46 and 91 (inclusive)

Participants between 3 and 6 months from Durational Limit *DAYS LEFT* between 92 and 182 (inclusive)

Participants between 6 and 9 months from Durational Limit *DAYS LEFT* between 183 and 273 (inclusive)

Participants between 9 and 13 months from Durational Limit *DAYS LEFT* between 274 and 396 (inclusive)

3. Within each cluster, sort participants by LAST NAME in ascending alphabetical order,

4. Then by FIRST NAME in ascending alphabetical order.

**Alpha-numeric Search field:** LAST NAME

This report is automatically generated by SPARQ and cannot be regenerated by users. See the Automatic Processes Specifications for frequency.

Display the date/time the report was last generated in the following formatted text, right-aligned near the top of the report:

Last Generated: mm/dd/yyyy hh:mm:ss XM

Display this message centered at the top of the report in bold red letters:

**Please note, outstanding rejects may affect the results of this report, including the accuracy of an individual’s durational limit**.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Total Participants 396 days From Durational Limit | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria |
| 2 | Participants within 30 days of Durational Limit | **Count** of participant records under Type “Participants within 30 days of Durational Limit” |
| 3 | Participants between 30 and 45 days from Durational Limit | **Count** of participant records under Type “Participants between 30 and 45 days from Durational Limit” |
| 4 | Participants between 46 days and 3 months from Durational Limit | **Count** of participant records under Type “Participants between 46 days and 3 months from Durational Limit” |
| 5 | Participants between 3 and 6 months from Durational Limit | **Count** of participant records under Type “Participants between 3 and 6 months from Durational Limit” |
| 6 | Participants between 6 and 9 months from Durational Limit | **Count** of participant records under Type “Participants between 6 and 9 months from Durational Limit” |
| 7 | Participants between 9 and 13 months from Durational Limit | **Count** of participant records under Type “Participants between 9 and 13 months from Durational Limit” |
| 2 | Participants 1 Quarter From Durational Limit | **Count** of participant records under Type “Participants 1 Quarter From Durational Limit” |
| 3 | Participants 2 Quarters From Durational Limit | **Count** of participant records under Type “Participants 2 Quarters From Durational Limit” |
| 4 | Participants 3 Quarters From Durational Limit | **Count** of participant records under Type “Participants 3 Quarters From Durational Limit” |
| 5 | Participants 4 Quarters From Durational Limit | **Count** of participant records under Type “Participants 4 Quarters From Durational Limit” |
| 8 | Total Participants 396 days From Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records that have at least one enrollment that satisfies the Selection Criteria  **AND**  (the enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 9 | Participants within 30 days of Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants within 30 days of Durational Limit”  **AND**  (the enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 10 | Participants between 30 and 45 days from Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants between 30 and 45 days from Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee that has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 11 | Participants between 46 days and 3 months from Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants between 46 days and 3 months from Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee that has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 12 | Participants between 3 and 6 months from Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants between 3 and 6 months from Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee that has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 13 | Participants between 6 and 9 months from Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants between 6 and 9 months from Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee that has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 14 | Participants between 9 and 13 months from Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants between 9 and 13 months from Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee that has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 7 | Participants 1 Quarter From Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants 1 Quarter From Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 8 | Participants 2 Quarters From Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants 2 Quarters From Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 9 | Participants 3 Quarters From Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants 3 Quarters From Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| 10 | Participants 4 Quarters From Durational Limit with at Least One Waiver Updated This Program Year | **Count** of participant records under Type “Participants 4 Quarters From Durational Limit”  **AND**  (there is an enrollment for this person under the selected grantee has at least one waiver factor = Y and updated in this program year **OR** “75 or Older” = “Yes”) |
| **#** | **Detail-level elements** | |
| 15 | Type **(for export file only)** | Type |
| 16 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”)  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, “Home Phone Number”, respectively.) |
| 17 | Has Enrollments In These Other Grantees | An alphabetically-sorted, comma-separated list of distinct GRANTEE ACRONYMS of all *other* grantees that have an enrollment record for the person.  If there are no enrollments with other grantees, then display “*None*”. |
| 18 | Address | Format: [STREET], [CITY], [STATE] [ZIP CODE]  (In the export file, list these values in individual columns named “Street Address”, “City”, “State”, and “Zip Code”, respectively.) |
| 19 | County of Residence | COUNTY |
| 20 | Email Address | PARTICIPANT EMAIL ADDRESS |
|  |  |  |
| 21 | Case Worker | CASE WORKER |
| 22 | Application Date | APPLICATION DATE |
| 23 | Enrollment Date | *ENROLLMENT DATE* |
| 24 | Date Expected to Reach Durational Limit | If *DAYS LEFT* is null, then display *REPORT RUN DATE*.  Else, if the participant has a break where BREAK START DATE is valued **and** BREAK END DATE is null, then display “N/A -- Currently on Approved Break”.  Else, display *REPORT RUN DATE* **plus** *DAYS LEFT*. |
| 20 | Termination Letter Due Date | DURATIONAL LIMIT DATE **minus** 30 |
| 21 | Age | Number of years (rounded down) between DATE OF BIRTH and (earliest of EXIT DATE and REPORT RUN DATE). |
| 22 | Date of Birth | DOB |
| 23 | Gender | GENDER |
| 24 | Race, American Indian or Alaskan Native | RACE AMERICAN INDIAN |
| 25 | Race, Asian | RACE ASIAN |
| 26 | Race, Black, African American | RACE BLACK |
| 27 | Race, Native Hawaiian/Pacific Islander | RACE PACIFIC |
| 28 | Race, White | RACE WHITE |
| 29 | Ethnicity: Hispanic, Latino, or Spanish Origin? | ETHNICITY |
| 30 | Disability | DISABILITY |
| 31 | Veteran Status | VETERAN |
| **Display the following elements toward the right side of the report.** | | |
| 32 | WAIVER FACTORS | (heading only, display in bold) |
| 33 | Severe Disability | Let *DISPLAY PY* be a constructed variable defined as follows.  Set *DISPLAY PY* = the latest PROGRAM YEAR for which this enrollment has (a valued SEVERE DISABILITY **or** a valued SEVERE DISABILITY DATE).  If this enrollment has no valued SEVERE DISABILITY **or** SEVERE DISABILITY DATE for any PROGRAM YEAR, set *DISPLAY PY* = null.  If *DISPLAY PY* is null, then display “*Blank*”.  Else:  If SEVERE DISABILITY for the *DISPLAY PY* = Y,  then display “Yes – [SEVERE DISABILITY DATE]” for the *DISPLAY PY*  Else, display “No – [SEVERE DISABILITY DATE]” for the *DISPLAY PY* |
| 34 | Frail | Repeat the instructions for “Severe Disability” but for FRAIL and its DATE. |
| 35 | Old Enough, Not Receiving SS Title II | Repeat the instructions for “Severe Disability” but for NOT RECEIVING SS II and its DATE. |
| 36 | Severely Ltd Emp Prospects | Repeat the instructions for “Severe Disability” but for SEVERELY LTD EMP PROSPECTS and its DATE. |
| 37 | Limited English Proficiency | Repeat the instructions for “Severe Disability” but for LEP WAIVER and its DATE. |
| 38 | Low Literacy Skills | Repeat the instructions for “Severe Disability” but for SKILLS DEFICIENT WAIVER and its DATE. |
| 39 | 75 or Older | If DATE OF BIRTH is null, then display “*Blank*”.  Else:  If the number of years (rounded down) between DATE OF BIRTH and (earliest of EXIT DATE and REPORT RUN DATE) >= 75, then display “Yes”.  Else, display “No”. |

## PARTICIPANTS WHO HAVE REACHED DURATIONAL LIMIT

**(Reached DL)**

**Selection Criteria**

Let *DURATIONAL LIMIT STATUS* be a constructed variable defined as follows:

For each of a participant’s valued *MONTH X DURATIONAL LIMIT DATE*:

If ((X-48)/12) + 1 <= **Count** of Extension Granted, then “Extended”

Else If ((X-48)/12) + 1 > **Count** of Extension Granted **and** EXIT DATE >= *MONTH X DURATIONAL LIMIT DATE*, then “Exited”

Else If ((X-48)/12) + 1 > **Count** of Extension **and** EXIT DATE is null, then “Beyond Durational Limit”

“All” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all durational limit date actions for participants **where** | List of all durational limit date actions for participants where |
| *DAYS LEFT ORIGINAL* <= 0 | The person has reached his/her 48 month durational limit |
| **AND**  there is an enrollment for the selected grantee/sub-grantee**where** *ENROLLMENT DATE* is valued | And the person has been enrolled with this grantee/sub |
| **AND**  EXIT DATE is null **or** >= *DURATIONAL LIMIT DATE ORIGINAL* | And the person is currently active or exited from the program after going beyond his/her durational limit |
| **AND**  NON EXIT REASON <> “ii\_Transferred\_grantee” | And the person did not transfer to another grantee |

“Extended” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of durational limit date actions for participants **where** | List of durational limit date actions for participants where |
| the “All” Selection Criteria are satisfied | The person has reached his/her 48 month durational limit, and has been enrolled with this grantee/sub |
| **AND**  *DURATIONAL LIMIT STATUS* = ‘Extended” | And the person received an extension on or after his/her valued durational limit date |

“Exited” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of durational limit date actions for participants **where** | List of durational limit date actions for participants where |
| the “All” Selection Criteria are satisfied | The person has reached his/her 48 month durational limit, and has been enrolled with this grantee/sub |
| **AND**  *DURATIONAL LIMIT STATUS =* “Exited” | And the person was exited on or after his/her valued durational limit date |

“Beyond durational limit” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of durational limit date actions for participants **where** | List of all durational limit date actions for participants where |
| the “All” Selection Criteria are satisfied | The person has reached his/her 48 month durational limit, and has been enrolled with this grantee/sub |
| **AND**  *DURATIONAL LIMIT STATUS =* “Beyond durational limit” | And the person has gone beyond durational limit as of his/her valued durational limit date |

**Introduction:** List of all durational limit date actions for participants who have reached their durational limit. This list of actions will include participants who have exited the program for durational limit, participants who have been granted durational limit extensions, and participants who are still currently active in SCSEP after going beyond the durational limit.

**Instructions:**

**Filters for durational limit extensions**

There is an option called “Show Only Participants with Extensions”. If it is selected when the report is run, the report’s outcome will include only participants who have reached their durational limit and have been granted durational limit extensions.

There is an option called “Show Only Participants without Extensions”. If it is selected when the report is run, the report’s outcome will include only participants who have reached their durational limit and have NOT been granted durational limit extensions.

There is an option called “Show All Participants Regardless of Extensions”. If it is selected when the report is run, the report’s outcome will include all participants who have reached their durational limit.

**Filter for Program Year**

There is a drop-down menu labeled “Program Year,” which contains all program years from 2011 to the current program year. If it is selected when the report is run, the report’s outcome will include only durational limit date actions that have occurred within the selected program year.

**Status Filters for Actions**

There is an option called “Show Extended Only”. If it is selected when the report is run, the report’s outcome will include only durational limit date actions where the participant was extended as of his/her valued durational limit date.

There is an option called “Show Exited Only”. If it is selected when the report is run, the report’s outcome will include only durational limit date actions where the participant was exited as of his/her valued durational limit date. There is an option called “Show Beyond Durational Limit Only”. If it is selected when the report is run, the report’s outcome will include only durational limit date actions where the participant was neither exited nor extended as of his/her valued durational limit date.

There is an option called “Show All”. If it is selected when the report is run, the report’s outcome will include all durational limit date actions.

**Date Filters for Durational Limit Dates**

There is a drop down menu labeled “Durational Limit Date” that has the following items depending on the maximum durational limit date available for the selected grantee and sub-grantee: “48 Month”, “60 Month”, “72 Month”, and “84 Month”.

Next to the drop down menu are two text boxes called "Durational Limit Date From” and “Durational Limit Date To". If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose 48-month Durational Limit Date, 60-month Durational Limit Date, 72-month Durational Limit Date, or 84-month Durational Limit Datefalls within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is a row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Display this message centered at the top of the report in bold red letters:

**Please note, outstanding rejects may affect the accuracy of an individual’s durational limit. Information on participants after their 48 month durational limit date may also be incomplete.**

**Display Instructions:** Each **participant** that has at least one enrollment that meets the chosen Selection Criteria should appear on the report for the selected sub-grantee for each of their *MONTH X DURATIONAL LIMIT DATES*.. If the user runs a grantee-level report, the participant appears under each sub-grantee for which the participant has at least one enrollment that meets the chosen Selection Criteria. For each participant that has *more than one* enrollment in the same sub-grantee that meet the Selection Criteria, display the enrollment-level information only from the enrollment with the latest *ENROLLMENT DATE*.

**Filters that limit the records by Durational Limit Date Status**

Display an option called “Show Extended Only”. If this filter is selected when the report is run, display only durational limit date actions that satisfy the “Extended” Selection Criteria above.

Display an option called “Show Exited Only”. If this filter is selected when the report is run, display only durational limit date actions that satisfy the “Exited” Selection Criteria above.

Display an option called “Show Beyond Durational Limit Only”. If this filter is selected when the report is run, display only durational limit date actions that satisfy the “Beyond Durational Limit” Selection Criteria above.

Display an option called “Show All”. If this filter is selected when the report is run, display all durational limit date actions for participants who satisfy the “All” Selection Criteria above.

**Filters that limit the records by which have or do not have durational limit extensions**

Display an option called “Show Only Participants with Extensions”. If this filter is selected when the report is run, display only participant records that satisfy the “All” Selection Criteria above **AND** have a durational limit extension with any grantee **where** Status = “Granted”.

Display another option called “Show Only Participants without Extensions”. If this filter is selected when the report is run, display only participant records that satisfy the “All” Selection Criteria above **AND** do **not** have a durational limit extension with any grantee **where** Status = “Granted”.

Display another option called “Show All Participants Regardless of Extensions”. If this filter is selected when the report is run, display only participant records that satisfy the “All” Selection Criteria above.

**Filter for Program Year**

Display a dropdown menu labeled “Program Year”. Include in the dropdown menu all program years from 2011 to the current program year in the following format: [YYYY]. If a user has selected a program year from this drop-down menu when the report is run, display only records that satisfy the “All” criteria above **AND** have any of their *MONTH X DURATIONAL LIMIT* *DATES* within that program year.

**Filter Date fields:**

Next to the drop down menu labeled “Durational Limit Date”, there are the following text fields: “Durational Limit Date From (mm/dd/yyyy)” and “Durational Limit Date To (mm/dd/yyyy)” as the “Starting Date” and “Ending Date” labels, respectively.

**Alpha-numeric Search field:** LAST NAME of the participant

**Sort Order:**

1. When a grantee-wide report is run, group the detail results by sub-grantee, in ascending order by Sub Name.

2. Within each sub-grantee, sort participants by LAST NAME in ascending order, and

3. then by FIRST NAME in ascending order.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| **Display the following elements in a grid formation (see Displayed Data Element Layout below).** | | |
| 1 | Number Reached 48-month Durational Limit | **Count** of all valued *MONTH 48 DURATIONALLIMIT DATES.* |
| 2 | Number Reached 60-month Durational Limit | **Count** of all valued *MONTH 60 DURATIONAL LIMIT DATES.*  Hide row if there are no valued *MONTH 60 DURATIONAL LIMIT DATES* present. |
| 3 | Number Reached 72-month Durational Limit | **Count** of all valued *MONTH 72 DURATIONAL LIMIT DATES.*  Hide row if there are no valued *MONTH 72 DURATIONAL LIMIT DATES* present. |
| 4 | Number Reached 84-month Durational Limit | **Count** of all valued *MONTH 84 DURATIONAL LIMIT DATES.*  Hide row if there are no valued *MONTH 84 DURATIONAL LIMIT DATES* present. |
| 5 | Number Reached 96-month Durational Limit | **Count** of all valued *MONTH 96 DURATIONAL LIMIT DATES.*  Hide row if there are no valued *MONTH 96 DURATIONAL LIMIT DATES* present. |
| 6 | 75 or Older When Person Was Last Extended or Exited | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Age When Person Was Last Extended or Exited ” >= 75  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants\ (show this as a percentage, rounded to one decimal place) |
| 7 | Female | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Gender” = “Female”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 8 | Male | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Gender” = “Male”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 9 | Minority | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, American Indian or Alaskan Native” = Y  **OR** “Race, Asian” = Y  **OR** “Race, Black, African American” = Y  **OR** “Race, Native Hawaiian/Pacific Islander” = Y  **OR** “Ethnicity: Hispanic, Latino, or Spanish Origin” = Y  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 10 | American Indian or Alaskan Native | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, American Indian or Alaskan Native” = Y  **AND** “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “No”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 11 | Asian | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, Asian” = Y  **AND** “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “No”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 12 | Black, African American | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, Black, African American” = Y  **AND** “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “No”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 13 | Native Hawaiian/Pacific Islander | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, Native Hawaiian/Pacific Islander” = Y  **AND** “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “No”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 114 | White | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Race, White” = Y  **AND** “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “No”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 15 | Two or More Races | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where  “Race, Did Not Voluntarily Report” = N **or** null  **AND**  *MULTIRACIAL* = “Yes”  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 16 | Hispanic, Latino, or Spanish Origin | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Ethnicity: Hispanic, Latino, or Spanish Origin” = Y  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 17 | Disability | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Disability” = Y\_SELF **or** Y\_DOC  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 18 | Veteran Status | Display “A (B)”  where  A = **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants where “Veteran Status” = a\_Veteran **or** b\_Eligible\_spouse\_of\_veteran  B = Result from A **divided by** **Count** of all *MONTH X DURATIONAL LIMIT DATES* reached by participants (show this as a percentage, rounded to one decimal place) |
| 19 | All records | (heading only, displayed in bold) |
| 20 | Received an extension | (heading only, displayed in bold) |
| 21 | Exited | (heading only, displayed in bold) |
| 22 | Beyond Durational Limit | (heading only, displayed in bold) |
| 23 | 1st column of measures (label not displayed) | Under the “All records” heading, display the results for summary elements 1 through 13 |
| 24 | 2nd column of measures (label not displayed) | Under the “Received an extension” heading, display the results for summary elements 1 through 13, but where the results are limited to records where *DURATIONAL LIMIT STATUS* = “Extended” for the specified *MONTH X DURATIONAL LIMIT DATE* |
| 25 | 3rd column of measures (label not displayed) | Under the “Exited” heading, display the results for summary elements 1 through 13, but where the results are limited to records where *DURATIONAL LIMIT STATUS* = “Exited” for the specified *MONTH X DURATIONAL LIMIT* |
| 26 | 4th column of measures (label not displayed) | Under the “Beyond 48-month durational limit” heading, display the results for summary elements 1 through 13, but where the results are limited to records where *DURATIONAL LIMIT STATUS* = “Beyond Durational Limit” for the specified *MONTH X DURATIONAL LIMIT* |
| **#** | **Detail-level elements** | |
| 27 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”)  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, “Home Phone Number”, respectively.) |
| **Display the following elements toward the bottom of the report.** | | |
| 28 | Months of Duration  - and -  Durational Limit Date  -and –  Status  -and-  Extension Request Date | (four headers, side by side, each displayed in underline) |
| 29 | Durational limit dates (label not displayed) | This shows all *MONTH X DURATIONAL LIMIT DATES* for an individual in list form. Each row in this list represents a durational limit date for this participant. Include in this list one row for each valued *MONTH X DURATIONAL LIMIT DATE.*   |  |  |  |  |  | | --- | --- | --- | --- | --- | |  | Display this under the “Months of Duration” header: | Display this under the “Durational Limit Date” header: | Display this under the “Status” header | Display this under the “Extension Request Date | | For ***each*** valued *MONTH X DURATIONAL LIMIT DATE*: | the X value from “*MONTH X DURATIONAL LIMIT DATE”* | *MONTH X DURATIONAL LIMIT DATE* | *DURATIONAL LIMIT STATUS*  for the valued *MONTH X DURATIONAL*  *LIMIT DATE* | If person received an extension, display the Request Date value. Else, display “N/A” |   If *EXTENSION DAYS* = 0, display only the row for *MONTH 48 DURATIONAL LIMIT DATE*.  Sort this list by “Months of Duration” in ascending order.  **For the export file,** for each participant, display all valued Months of Duration, *MONTH X DURATIONAL LIMIT DATES* , *DURATIONAL LIMIT STATUS*, **and** Extension Request Dates as shown in the table above. Display a row for each Month of Duration, *MONTH X DURATIONAL LIMIT DATE*, *DURATIONAL LIMIT STATUS*, **and** Extension Request Date for as many rows that are needed to display all valued *MONTH X DURATIONAL LIMIT DATES* . |
| 30 | County of Residence | COUNTY |
| 31 | Case Worker | CASE WORKER |
| 32 | Application Date | APPLICATION DATE |
| 33 | Enrollment Date | *ENROLLMENT DATE* |
| 34 | Exit Date | EXIT DATE |
| 35 | Date of Birth | DATE OF BIRTH |
| 36 | Days Beyond Current Durational Limit | If *DAYS LEFT* <= 0, then display the absolute value of *DAYS LEFT.*  Otherwise, display nothing. |
| **Display the following elements toward the right side of the report.** | | |
| 37 | Age When Person Was Last Extended or Exited | If *DURATIONAL LIMIT STATUS* of the most recent *MONTH X DURATIONAL LIMIT DATE* = “Extended”, then **Number** of years (rounded down) between DATE OF BIRTH and latest EXTENSION REQUEST DATE.  Else if *DURATIONAL LIMIT STATUS* of the most recent *MONTH X DURATIONAL LIMIT DATE* = “Exited” ,then **Number** of years (rounded down) between DATE OF BIRTH and EXIT DATE.  Else if *DURATIONAL LIMIT STATUS* of the most recent *MONTH X DURATIONAL LIMIT DATE* = “Beyond Durational Limit”, then **Number** of years (rounded down) between DATE OF BIRTH and *REPORT RUN DATE*. |
| 38 | Gender | GENDER |
| 39 | Race, American Indian or Alaskan Native | RACE AMERICAN INDIAN |
| 40 | Race, Asian | RACE ASIAN |
| 41 | Race, Black, African American | RACE BLACK |
| 42 | Race, Native Hawaiian/Pacific Islander | RACE PACIFIC |
| 43 | Race, White | RACE WHITE |
| 44 | Two or More Races | *MULTIRACIAL* |
| 45 | Ethnicity: Hispanic, Latino, or Spanish Origin | ETHNICITY |
| 46 | Disability | DISABILITY (show the “clean” version of the values that appear on WDCS screen P3/E3) |
| 47 | Veteran Status | VETERAN (show the “clean” version of the values that appear on WDCS screen P3/E3) |
| **Display the following elements toward the left side of the report.** | | |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **All records:** | **Received an extension:** | **Exited:** | **Beyond Durational Limit:** |
| Number Reached 48-month Durational Limit: | [value] | [value] | [value] | [value] |
| Number Reached 60-month Durational Limit:  Number Reached 72-month Durational Limit:  Number Reached 84-month Durational Limit:  Number Reached 96-month Durational Limit: | [value]  [value]  [value]  [value] | [value]  [value]  [value]  [value] | [value]  [value]  [value]  [value] | [value]  [value]  [value]  [value] |
| 75 or Older When Person Was Last Extended or Exited: | [value] | [value] | [value] | [value] |
| Female: | [value] | [value] | [value] | [value] |
| Male: | [value] | [value] | [value] | [value] |
| Minority: | [value] | [value] | [value] | [value] |
| American Indian or Alaskan Native: | [value] | [value] | [value] | [value] |
| Asian: | [value] | [value] | [value] | [value] |
| Black, African American: | [value] | [value] | [value] | [value] |
| Native Hawaiian/Pacific Islander: | [value] | [value] | [value] | [value] |
| White: | [value] | [value] | [value] | [value] |
| Two or More Races | [value] | [value] | [value] | [value] |
| Hispanic, Latino, or Spanish Origin: | [value] | [value] | [value] | [value] |
| Disability: | [value] | [value] | [value] | [value] |
| Veteran Status: | [value] | [value] | [value] | [value] |

**RESULTS DETAILS:**

**[Participant]**

|  |  |  |  |
| --- | --- | --- | --- |
| County of Residence: | [value] | Age WhenPerson Was last Extended or Exited: | [value] |
|  |  | Gender: | [value] |
| Case Worker: | [value] | Race, American Indian or Alaskan Native: | [value] |
| Application Date: | [value] | Race, Asian: | [value] |
| Enrollment Date: | [value] | Race, Black, African American: | [value] |
| Exit Date: | [value] | Race, Native Hawaiian/Pacific Islander: | [value] |
| Date of Birth:  Days Beyond Current Durational Limit | [value]  [value] | Race, White:  Two or More Races | [value]  [value] |
|  |  | Ethnicity: Hispanic, Latino, or Spanish Origin: | [value] |
|  |  | Disability: | [value] |
|  |  | Veteran Status: | [value] |



|  |  |  |  |
| --- | --- | --- | --- |
| Months of Duration | Durational Limit Date | Status | Extension Request Date |
| [value] | [value] | [value] | [value] |

## PARTICIPANTS WITH APPROVED BREAK(S)

**(Break)**

**Selection Criteria**

“Open” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all breaks **where** | List of all breaks where |
| BREAK START DATE is valued | the break has started |
| **AND**  BREAK END DATE is null | and hasn’t yet ended |

“Closed” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all breaks **where** | List of all breaks where |
| BREAK START DATE is valued | the break has started |
| **AND**  BREAK END DATE is valued | and has ended |

**Introduction:** List of all people with an approved break. The number of days for the break (Break Days) is displayed. Information displayed includes the count of participants that have an approved break, the number of participants ever on an approved break, the participant name, contact information, break start and end dates, application date, assignment date, and case worker.

**Instructions:**

**Date Filters**

There are two text boxes called "Start Date From" and "Start Date To" next to the "Show Results Summary" and "Show Results Details" checkboxes. If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Break Start Dates fall within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Filter Date field:** BREAK START DATE

Display “Start Date From (mm/dd/yyyy):” and “Start Date To (mm/dd/yyyy):” next to the associated Filter Date fields.

**Alpha-numeric Search field:** LAST NAME

**Sort order:**

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name).

2. Within each sub-grantee, sort participants by LAST NAME in ascending alphabetical order,

3. Then by BREAK START DATE in descending order.

Filters that limit the records by which set of Selection Criteria they meet

Display an option called “Show Currently Open Approved Breaks Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Open” Selection Criteria above.

Display another option called “Show Closed Approved Breaks Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Closed” Selection Criteria above.

Display another option called “Show All Approved Breaks”. If this filter is selected when the report is run, display enrollments that satisfy both sets of Selection Criteria above.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Participants With Displayed Approved Breaks | **Count** of participants that have at least one break that met the applied Selection Criteria. |
| 2 | Number of Participants Currently on Approved Break | If the “Open” Selection Criteria were not applied when the report was run, then display “N/A”.  Else, display **count** of participants that have at least one break that met the “Open” Selection Criteria. |
| 3 | Average Days on Displayed Approved Breaks | **Average** of **“**Days on Approved Break” for all enrollments with a break record that met the applied Selection Criteria **and** (EXIT DATE is null **or** EXIT DATE >= 7/1/2007) (round this result to one decimal place) |
| **#** | **Detail-level elements** | |
| 4 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”)  If a participant has more than one enrollment that each has a break that meets the Selection Criteria, then use the HOME PHONE NUMBER from the enrollment with the break that has the latest BREAK START DATE.  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, and “Home Phone Number”, respectively.) |
| 5 | Break Start Date | BREAK START DATE |
| 6 | Break Expected End Date | BREAK EXPECTED END DATE |
| 7 | Break Actual End Date | BREAK END DATE |
| 8 | Reason for Approved Break | BREAK REASON |
| 9 | Days on Approved Break | *LENGTH OF BREAK* |
| 10 | Application Date | APPLICATION DATE |
| 11 | Assignment Date | ASSIGNMENT DATE (of parent CSA) |
| 12 | Exit Date | EXIT DATE |
| 13 | Address | Format: [STREET], [CITY], [STATE] [ZIP CODE]  (In the export file, list these values in individual columns named “Street Address”, “City”, “State”, and “Zip Code”, respectively.) |
| 14 | County of Residence | COUNTY |
| 15 | Case Worker | CASE WORKER |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Participants Ever on Approved Break: [value]

Number of Participants Currently on Approved Break: [value]

Average Days on All Approved Breaks: [value]

**RESULTS DETAILS:**

**[Participant]**

**Break Start Date: [value]**

Break Expected End Date: [value] Address: [value]

Break Actual End Date: [value] County of Residence: [value]

Days on Approved Break: [value]

Reason for Approved Break: [value] Case Worker: [value]

Application Date: [value]

Assignment Date: [value]

Exit Date [value]

[Repeat format for the next break under this participant.]

[Repeat format for the next participant.]

## PARTICIPANTS WITH COMMUNITY SERVICE, PAID TRAINING AND SICK LEAVE HOURS

**(Hours)**

**Selection Criteria**

“Active” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all enrollments where |
| INITIAL ASSIGNMENT DATE is valued | The participant has an initial assignment |
| **AND**  EXIT DATE is null | And the participant has not been exited |
| **AND**  There is an assignment associated with the enrollment that has hours reported for the selected program year | And the participant reported community service, paid training or sick leave hours in one quarter of the program year |

“Closed” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all enrollments where |
| INITIAL ASSIGNMENT DATE is valued | The participant has an initial assignment |
| **AND**  EXIT DATE is valued | And the participant has been exited |
| **AND**  There is an assignment associated with the enrollment that has hours reported for the selected program year | And the participant reported community service, paid training or sick leave hours in one quarter of the program year |

**Introduction:** List of all active and closed participants and their reported community service hours, paid training hours and paid sick leave hours. Hours shown may be reported outside of the date range to be counted toward the performance measure.

**Instructions:**

**Active Filters for enrollments**

There is an option called “Show Active Enrollments Only”. If it is selected when the report is run, the report’s outcome will include enrollments that meet the “Active” selection criteria.

There is an option called “Show Closed Enrollments Only”. If it is selected when the report is run, the report’s outcome will include enrollments that meet the “Exited” selection criteria.

There is an option called “Show All Enrollments”. If it is selected when the report is run, the report’s outcome will include enrollments that meet either the “Active” or “Exited” selection criteria.

**Program Year Dropdown**

Displayed beneath the Sub-Grantee dropdown is a dropdown field labeled “Program Year” and includes a range of program years from the current program year to 2010. Clicking on any of the program years will limit the records displayed to only hours reported during the selected program year. This dropdown is required to run the report.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Alpha-numeric Search field:** LAST NAME

**Sort order:**

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name).

2. Within each sub-grantee, sort participants by LAST NAME in ascending alphabetical order,

3. Within each last name, sort assignments by ASSIGNMENT DATE in descending order.

**Filters that limit the records by the selection criteria they meet**

Display an option called “Show Active Enrollments Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Active” Selection Criteria above.

Display another option called “Show Closed Enrollments Only”. If this filter is selected when the report is run, display only enrollments that satisfy the “Closed” Selection Criteria above.

Display another option called “Show Active and Closed Enrollments”. If this filter is selected when the report is run, display enrollments that satisfy both sets of Selection Criteria above.

Filters that limit the records by program year

Display a dropdown called “Program Year”. If this filter is selected when the report is run, display only hours reported during that program year.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Enrollments | **Count** of Enrollments that met the applied Selection Criteria. |
| 2 | Number of Active Enrollments | If the “Active” criteria was not selected when this report was run, then display “N/A”  Else**,** display the **Count** of Enrollments that met the “Active” Selection Criteria. |
| 3 | Number of Enrollments with CSA Hours | **Count** of Enrollments that met the applied Selection Criteria **and** the **Sum** of TOTAL HOURS PAID for all four quarters **minus (**the **Sum** of TOTAL HOURS PAID TRAINING for all four quarters **plus** the **sum** of TOTAL HOURS PAID SICK for all four quarters) > 0 for the selected Program Year. |
| 4 | Number of Enrollments with Paid Training | **Count** of Enrollments that met the applied Selection Criteria **and** the **Sum** of TOTAL HOURS PAID TRAINING for all four quarters > 0 for the selected Program Year. |
| 5 | Number of Enrollments with Paid Sick Leave | **Count** of Enrollments that met the applied Selection Criteria **and** the **Sum** of TOTAL HOURS PAID SICK for all four quarters > 0 for the selected Program Year. |
| 6 | Total Paid Hours Quarter 1 | **Sum** of TOT\_HOURS\_Q1 where *COUNTABLE Q1 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 7 | Total Paid Training Hours Quarter 1 | **Sum** of TOT\_HOURS\_TRAINING\_Q1 for all enrollments that met the applied Selection Criteria. |
| 8 | Total Paid Sick Leave Hours Quarter 1 | **Sum** of TOT\_HOURS\_SICK\_Q1 for all enrollments that met the applied Selection Criteria. |
| 9 | Total Paid CSA Hours Quarter 1 | **Sum** of TOT\_HOURS\_Q1 **minus (**the **Sum** of TOTAL\_HOURS\_TRAINING\_Q1 **plus** the **Sum** of TOTAL\_HOURS\_SICK\_Q1) where *COUNTABLE Q1 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 10 | Total Paid Hours Quarter 2 | **Sum** of TOT\_HOURS\_Q2 where *COUNTABLE Q2 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 11 | Total Paid Training Hours Quarter 2 | **Sum** of TOT\_HOURS\_TRAINING\_Q2 for all enrollments that met the applied Selection Criteria. |
| 12 | Total Paid Sick Leave Hours Quarter 2 | **Sum** of TOT\_HOURS\_SICK\_Q2 for all enrollments that met the applied Selection Criteria. |
| 13 | Total Paid CSA Hours Quarter 2 | **Sum** of TOT\_HOURS\_Q2 **minus (**the **Sum** of TOTAL\_HOURS\_TRAINING\_Q2 **plus** the **Sum** of TOTAL\_HOURS\_SICK\_Q2) where *COUNTABLE Q2 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 14 | Total Paid Hours Quarter 3 | **Sum** of TOT\_HOURS\_Q3 where *COUNTABLE Q3 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 15 | Total Paid Training Hours Quarter 3 | **Sum** of TOT\_HOURS\_TRAINING\_Q3 for all enrollments that met the applied Selection Criteria. |
| 16 | Total Paid Sick Leave Hours Quarter 3 | **Sum** of TOT\_HOURS\_SICK\_Q3 for all enrollments that met the applied Selection Criteria. |
| 17 | Total Paid CSA Hours Quarter 3 | **Sum** of TOT\_HOURS\_Q3 **minus (**the **Sum** of TOTAL\_HOURS\_TRAINING\_Q3 **plus** the **Sum** of TOTAL\_HOURS\_SICK\_Q3) where *COUNTABLE Q3 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 18 | Total Paid Hours Quarter 4 | **Sum** of TOT\_HOURS\_Q4 where *COUNTABLE Q4 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| 19 | Total Paid Training Hours Quarter 4 | **Sum** of TOT\_HOURS\_TRAINING\_Q4 for all enrollments that met the applied Selection Criteria. |
| 20 | Total Paid Sick Leave Hours Quarter 4 | **Sum** of TOT\_HOURS\_SICK\_Q4 for all enrollments that met the applied Selection Criteria. |
| 21 | Total Paid CSA Hours Quarter 4 | **Sum** of TOT\_HOURS\_Q4 **minus (**the **Sum** of TOTAL\_HOURS\_TRAINING\_Q4 **plus** the **Sum** of TOTAL\_HOURS\_SICK\_Q4) where *COUNTABLE Q4 HOURS WORKED* = “Yes” for all enrollments that met the applied Selection Criteria. |
| **#** | **Detail-level elements** | |
| 22 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”)  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, and “Home Phone Number”, respectively.) |
| 23 | Initial Assignment Date | *INITIAL ASSIGNMENT DATE* |
| 24 | Exit Date | EXIT DATE |
| 25 | Program Year | Program year selected in dropdown |
| 26 | Host Agency Name | ORGANIZATION NAME |
| 27 | Host Agency ID | ORG\_ID |
| 28 | Type | ORG TYPE |
| 29 | Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP]  (In the export file, list these values in individual columns named “HA Street Address”, “HA City”, “HA State”, and “HA Zip Code”, respectively.) |
| 31 | Assignment Date | ASSIGNMENT\_DATE |
| 32 | Assignment Start Date | ASSIGNMENT\_START\_DATE |
| 33 | Assignment End Date | ASSIGNMENT\_END\_DATE |
| 34 | Total Hours Paid in Quarter 1 | If *COUNTABLE Q1 HOURS WORKED* = “Yes”, display TOT\_HOURS\_Q1. Else, display “Not Countable” |
| 35 | Total Hours Paid Training in Quarter 1 | TOT\_HOURS\_TRAINING\_Q1 |
| 36 | Total Hours of Paid Sick Leave in Quarter 1 | TOT\_HOURS\_SICK\_Q1 |
| 37 | Total Hours Paid in Quarter 2 | If *COUNTABLE Q2 HOURS WORKED* = “Yes”, display TOT\_HOURS\_Q2. Else, display “Not Countable” |
| 38 | Total Hours Paid Training in Quarter 2 | TOT\_HOURS\_TRAINING\_Q2 |
| 39 | Total Hours of Paid Sick Leave in Quarter 2 | TOT\_HOURS\_SICK\_Q2 |
| 40 | Total Hours Paid in Quarter 3 | If *COUNTABLE Q3 HOURS WORKED* = “Yes”, display TOT\_HOURS\_Q3. Else, display “Not Countable” |
| 41 | Total Hours Paid Training in Quarter 3 | TOT\_HOURS\_TRAINING\_Q3 |
| 42 | Total Hours of Paid Sick Leave in Quarter 3 | TOT\_HOURS\_SICK\_Q3 |
| 43 | Total Hours Paid in Quarter 4 | If *COUNTABLE Q4 HOURS WORKED* = “Yes”, display TOT\_HOURS\_Q4. Else, display “Not Countable” |
| 44 | Total Hours Paid Training in Quarter 4 | TOT\_HOURS\_TRAINING\_Q4 |
| 45 | Total Hours of Paid Sick Leave in Quarter 4 | TOT\_HOURS\_SICK\_Q4 |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Enrollments: [value]

Number of Active Enrollments: [value]

Number of Enrollments with CSA Hours: [value]

Number of Enrollments with Paid Training: [value]

Number of Enrollments with Paid Sick Leave: [value]

**HOURS SUMMARY TABLE:**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Quarter** | **Total Paid Hours** | **Total Paid Training Hours** | **Total Paid Sick Leave Hours** | **Total Paid CSA Hours** |
| 1 | [value] | [value] | [value] | [value] |
| 2 | [value] | [value] | [value] | [value] |
| 3 | [value] | [value] | [value] | [value] |
| 4 | [value] | [value] | [value] | [value] |

**RESULTS DETAILS:**

**[Participant]**

Initial Assignment Date: [value]

Exit Date: [value]

Program Year: [value]

**Host Agency Name: [value]**

Host Agency ID: [value] Assignment Date: [value]

Type: [value] Assignment Start Date: [value]

Address: [value] Assignment End Date: [value]

Total Hours Paid in Quarter 1: [value] Total Hours Paid in Quarter 3: [value]

Total Hours Paid Training in Quarter 1: [value] Total Hours Paid Paid Training in Quarter 3: [value]

Total Hours Paid Sick Leave in Quarter 1: [value] Total Hours Paid Sick Leave in Quarter 3: [value]

Total Hours Paid in Quarter 2: [value] Total Hours Paid in Quarter 4: [value]

Total Hours Paid Training in Quarter 2: [value] Total Hours Paid Training in Quarter 4: [value]

Total Hours Paid Sick leave in Quarter 2: [value] Total Hours Paid Sick Leave Quarter 4: [value]

[Repeat format for the next assignment under this enrollment.]

[Repeat format for the next enrollment.]

# Group #3: FOLLOW-UPS

A. Each of the Follow-ups has a Separate Logic Set

There are three sets of logic required to determine when SCSEP grantees should perform follow-up activities to collect performance data, one for each of the three follow-ups.

* Follow-up 1 is only required when an exited participant is placed in unsubsidized employment and still has an open UE record with some employer.
* Follow-up 2 is required for a subset of participants who have had a Follow-up 1 conducted for them.
* Follow-up 3 is required for a subset of participants who have had a Follow-up 1 conducted for them.

Follow-ups are conducted by contacting employers. Therefore, a single participant may have multiple follow-up 1s, 2s, and 3s if they are employed by multiple employers. The follow-up reports list the scheduled dates ***for each employer follow-up*** required. When a participant first starts work, all three follow-ups will be shown based on the assumption that the participant will remain employed with that first employer throughout the follow-up period. If the participant ceased employment before the first quarter after the exit quarter, a Follow-up 2 will no longer be scheduled. If the participant has additional employers during the follow-up period, those employers will be added to the report as appropriate.

B. There are Two Separate Displays of the Scheduled Follow-ups

The selection criteria determine whether a row will appear on the Pending Follow-up report. The other report, By Month, is based on the Pending report. The By Month report lists all of the scheduled dates on the Pending Follow-up report organized into separate sections by month. If a row on the Pending report shows three scheduled dates for a placement, there would be three rows in the monthly report, one for each relevant month.

## ALL PENDING FOLLOW-UPS

**(Pending FU)**

**Selection Criteria**

**Important Display / Selection Note:** This report should be a list of follow-ups. A UE can appear on the list of follow-ups more than once if the UE will need multiple follow-ups done. Use the following logic to determine which follow-ups need to be put on the report.

If a UE record meets the selection criteria for Follow-up 1, then put up to 3 rows on the report:

one for follow-up 1,

one for follow-up 2 (if SECOND\_THIRD\_QTR\_FU\_COMPLETED\_DATE is null), and

one for follow-up 3 (if FOURTH\_QTR\_FU\_COMPLETED\_DATE is null).

Else if a UE record meets the selection criteria for Follow-up 2, then put up to 2 rows on the report:

one for follow-up 2 and

one for follow-up 3 (if FOURTH\_QTR\_FU\_COMPLETED\_DATE is null).

Else if a UE record meets the selection criteria for Follow-up 3, then put 1 row on the report

for follow-up 3.

Else do not include any rows on the report for this UE record.

**FU 1 Specifications**

|  |  |  |
| --- | --- | --- |
| **#** | Specification: | **Annotation:** |
|  | List of all placement (UE) records **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The person has exited from the program |
| **2** | **AND**  START\_DATE >= EXIT\_DATE | The placement has started on or after the exit date |
| **3** | **AND**  START\_DATE < *FD2QAEQ* | The placement started before the first day of the second quarter after exit quarter |
| **4** | **AND**  END\_DATE >= *FD1QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or will end after the first day of the first quarter after exit quarter |
| **5** | **AND**  FIRST\_QTR\_FU\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 1 |
| **6** | **AND**  There is no UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* | The participant does not already have a successful follow-up 1 |
| **7** | **AND**  *EXCLUDED* = “No” | The enrollment has not been excluded from the performance measures |
| **8** | **AND**  *REPORT RUN DATE* <= *Q1FUED* | The follow-up can impact the year-end QPR |
| **9** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **10** | **AND**  There is no UE record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **11** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD1QAEQ***

**FU 2 Specifications**

|  |  |  |
| --- | --- | --- |
| # | Specification: | **Annotation:** |
|  | List of all placement (UE) records **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The participant has exited the program |
| **2** | **AND**  START\_DATE >= EXIT\_DATE | The placement has started on or after the exit date |
| **3** | **AND**  START\_DATE < *FD4QAEQ* | The placement started before the first day of the fourth quarter after exit quarter |
| **4** | **AND**  END\_DATE >= *FD2QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or ended after the first day of the second quarter after the exit quarter. |
| **5** | **AND**  SECOND\_THIRD\_QTR\_FU\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 2 |
| **6** | **AND**  There is a UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* | The participant has a successful follow-up 1 |
| **7** | **AND**  *EXCLUDED* = “No” | The enrollment has not been excluded from the performance measures |
| **8** | **AND**  *REPORT RUN DATE* <= *Q2Q3FUED* | The follow-up can impact the year-end QPR |
| **9** | **AND**  FIRST\_QTR\_WAGES\_TEXT <> “vii\_Unable“ | If the FU 1 for this employer resulted in unable to obtain information, we will not try to do a FU2. |
| **10** | **AND**  There is no UE record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **11** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD4QAEQ***

**FU 3 Specifications**

|  |  |  |
| --- | --- | --- |
| **#** | Specification: | **Annotation:** |
|  | List of all placements (UE records) **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The participant has exited the program |
| **2** | **AND**  START\_DATE >= EXIT\_DATE | This placement has started on or after the exit date |
| **3** | **AND**  START\_DATE < *FD5QAEQ* | The placement started before the first day of the fifth quarter after exit quarter |
| **4** | **AND**  END\_DATE >= *FD4QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or ended after the first day of the fourth quarter after the exit quarter |
| **5** | **AND**  FOURTH\_QTR\_FU\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 3 |
| **6** | **AND**  There is a UE record for this enrollment where  FIRST\_QTR\_WAGES\_TEXT = *“YES”* | The participant has a successful follow-up 1 |
| **7** | **AND**  *EXCLUDED* = “No”  **AND**  EXCLUSION\_DATE is null **or** >= *FD5QAEQ*  **AND**  There is no UE record for this enrollment where  FOURTH\_QTR\_WAGES\_TEXT = “viii\_Excluded“ | The enrollment has not been excluded from the performance measures |
| **8** | **AND**  *REPORT RUN DATE* <= *Q4FUED* | The follow-up can impact the year-end QPR |
| **9** | **AND**  FIRST\_QTR\_WAGES\_TEXT <> “vii\_Unable“ **and**  SECOND\_QTR\_WAGES\_TEXT <> “vii\_Unable“ **and** THIRD\_QTR\_WAGES\_TEXT <> “vii\_Unable“ | If the FU 1 or FU 2 for this employer resulted in unable to obtain information, we will not try to do a FU3. |
| **10** | **AND**  There is no UE record for this enrollment where  FOURTH\_QTR\_WAGES\_TEXT = *“YES”* | No follow-up for the participation has already indicated that the participant has wages in the fourth quarter after exit |
| **11** | **AND**  There is no UE record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **12** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD4QAEQ***

**Note:** UE records that satisfy the selection criteria for FU 2 **and** FU 3 at the same time should be considered as having satisfied the selection criteria for FU 2 **only**. SuchUEs should appear only once on the report and only once in the export file like all other UEs that satisfy one of the sets of selection criteria.

**Introduction:** List of pending follow-ups. A UE can appear on the list of follow-ups more than once if the UE needs multiple follow-ups completed. The follow-up scheduled dates along with employer information are displayed.

**Instructions:**

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Participants | Number of participants that have at least one UE counted in the Selection Criteria |
| 2 | Number of Pending FU 1 | Total number of UE records that satisfy the FU 1 Specifications above |
| 3 | Number of Pending FU 2 | Total number of UE records that satisfy the FU 2 Specifications above |
| 4 | Number of Pending FU 3 | Total number of UE records that satisfy the FU 3 Specifications above |
| **#** | **Detail-level elements** | |
| 5 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 6 | County of Residence | COUNTY |
| 7 | Case Worker | CASE WORKER |
| 8 | Exit Date | EXIT\_DATE |
| 9 | FU1 Date | Follow-Up 1 Scheduled Date  **Note:** Do not display this element if the UE doesn’t have a pending Follow-up 1. |
| 10 | FU2 Date | Follow-Up 2 Scheduled Date  **Note:** Do not display this element if the UE doesn’t have a pending Follow-up 2. |
| 11 | FU3 Date | Follow-Up 3 Scheduled Date |
| 12 | Days Left Until End of Second Quarter | **Number** of days between *REPORT RUN DATE* and the first day of the third quarter after exit quarter. |
| 13 | Days Left Until End of Third Quarter | **Number** of days between *REPORT RUN DATE* and the first day of the fourth quarter after exit quarter. |
| 14 | Indent the next headings and list on separate rows |  |
| 15 | Employer | ORGANIZATION NAME |
| 16 | ID | ORG\_ID |
| 17 | Address | Format (values from organization’s address): [STREET] [CITY], [STATE] [ZIP CODE] |
| 18 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |

## 

## ALL PY 2018 PENDING FOLLOW-UPS

**(Pending FU)**

**Selection Criteria**

**Important Display / Selection Note:** This report should be a list of follow-ups. A placement can appear on the list of follow-ups more than once if the placement will need multiple follow-ups done. Use the following logic to determine which follow-ups need to be put on the report.

If a placement record meets the selection criteria for Follow-up 1, then put 1 row on the report for Follow-up 1.

If a placement record meets the selection criteria for Follow-up 2, then put 1 row on the report for Follow-up 2.

If a placement record meets the selection criteria for Follow-up 3, then put 1 row on the report for Follow-up 3.

Else do not include any rows on the report for this placement record.

**FU 1 Specifications**

|  |  |  |
| --- | --- | --- |
| **#** | Specification: | **Annotation:** |
|  | List of all placement (UE) records **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The person has exited from the program |
| **2** | **AND** EXIT\_DATE >= 1/1/2018 | The exit date is on or after 1/1/2018 |
| **3** | **AND**  START\_DATE >= EXIT\_DATE | The placement has started on or after the exit date |
| **4** | **AND**  START\_DATE < *FD3QAEQ* | The placement started before the first day of the third quarter after exit quarter |
| **5** | **AND**  END\_DATE >= *FD2QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or will end after the first day of the second quarter after exit quarter |
| **6** | **AND**  PY18\_FU\_1\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 1 |
| **7** | **AND**  There is no placement record for this enrollment where  PY18\_FU\_1\_WAGES\_TEXT = *“YES”* | The participant does not already have a successful follow-up 1 |
| **8** | **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | The enrollment has not been excluded from the performance measures |
| **9** | **AND**  *REPORT RUN DATE* <= *Q2FUED* | The follow-up can impact the year-end QPR |
| **10** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **11** | **AND**  There is no placement record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **12** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD2QAEQ***

**FU 2 Specifications**

|  |  |  |
| --- | --- | --- |
| # | Specification: | **Annotation:** |
|  | List of all placement (UE) records **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The participant has exited the program |
| **2** | **AND** EXIT\_DATE >= 1/1/2018 | The exit date is on or after 1/1/2018 |
| **3** | **AND**  START\_DATE >= EXIT\_DATE | The placement has started on or after the exit date |
| **4** | **AND**  START\_DATE < *FD3QAEQ* | The placement started before the first day of the third quarter after exit quarter |
| **5** | **AND**  END\_DATE >= *FD2QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or ended after the first day of the second quarter after the exit quarter. |
| **6** | **AND**  PY18\_FU\_2\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 2 |
| **7** | **AND**  PY18\_FU\_2\_WAGES\_AMT is null |
| **8** | **AND**  PY18\_FU\_1\_WAGES\_TEXT = *“YES”* | The participant has a successful follow-up 1 |
| **9** | **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | The enrollment has not been excluded from the performance measures |
| **10** | **AND**  *REPORT RUN DATE* <= *Q2 WAGE FUED* | The follow-up can impact the year-end QPR |
| **11** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **11** | **AND**  There is no placement record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **12** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD3QAEQ***

**FU 3 Specifications**

|  |  |  |
| --- | --- | --- |
| **#** | Specification: | **Annotation:** |
|  | List of all placements (UE records) **where** | One row on the report for each placement |
| **1** | DATE OF EXIT is valued for this enrollment | The participant has exited the program |
| **2** | **AND** EXIT\_DATE >= 7/1/2017 | The exit date is on or after 7/1/2017 |
| **3** | **AND**  START\_DATE >= EXIT\_DATE | This placement has started on or after the exit date |
| **4** | **AND**  START\_DATE < *FD5QAEQ* | The placement started before the first day of the fifth quarter after exit quarter |
| **5** | **AND**  END\_DATE >= *FD4QAEQ*  **OR**  END\_DATE is null | The placement either did not end, or ended after the first day of the fourth quarter after the exit quarter |
| **6** | **AND**  PY18\_FU\_3\_COMPLETED\_DATE is null | The placement does not have a completed follow-up 3 |
| **7** | **AND**  There is no placement record for this enrollment where  PY18\_FU\_3\_WAGES\_TEXT = *“YES”* | No follow-up for the participation has already indicated that the participant has wages in the fourth quarter after exit |
| **8** | **AND**  PY18\_EXIT\_REASON\_OTHER ≠ v\_Deceased, vi\_Participants\_health/medical, vii\_Institutionalized, viii\_Reserve\_personnel\_called\_to\_active\_duty, or ix\_Ineligible\_due\_to\_income\_at\_recertification  **AND**  EXIT\_REASON\_OTHER ≠ 4\_Non-income\_eligible, 7\_Deceased, 8\_Health/medical, or 10\_Institutionalized | The enrollment has not been excluded from the performance measures |
| **9** | **AND**  *REPORT RUN DATE* <= *Q4FUED* | The follow-up can impact the year-end QPR |
| **10** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **11** | **AND**  There is no placement record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **12** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD4QAEQ***

**Introduction:** List of pending follow-ups. A placement can appear on the list of follow-ups more than once if the placement needs multiple follow-ups completed. The follow-up scheduled dates along with employer information are displayed.

**Instructions:**

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Alpha-numeric Search field:** LAST NAME of the participant

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Participants | Number of participants that have at least one placement counted in the Selection Criteria |
| 2 | Number of Pending FU 1 | Total number of placement records that satisfy the FU 1 Specifications above |
| 3 | Number of Pending FU 2 | Total number of placement records that satisfy the FU 2 Specifications above |
| 4 | Number of Pending FU 3 | Total number of placement records that satisfy the FU 3 Specifications above |
| **#** | **Detail-level elements** | |
| 5 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 6 | County of Residence | COUNTY |
| 7 | Case Worker | CASE WORKER |
| 8 | Exit Date | EXIT\_DATE |
| 9 | FU1 Date | PY18\_FU\_1\_SCHEDULED\_DATE  **Note:** Do not display this element if the placement doesn’t have a pending Follow-up 1. |
| 10 | FU2 Date | PY18\_FU\_2\_SCHEDULED\_DATE  **Note:** Do not display this element if the placement doesn’t have a pending Follow-up 2. |
| 11 | FU3 Date | PY18\_FU\_3\_SCHEDULED\_DATE |
| 12 | Days Left Until End of Second Quarter | **Number** of days between *REPORT RUN DATE* and the first day of the third quarter after exit quarter. |
| 13 | Days Left Until End of Third Quarter | **Number** of days between *REPORT RUN DATE* and the first day of the fourth quarter after exit quarter. |
| 14 | Days Left Until End of Fourth Quarter | **Number** of days between *REPORT RUN DATE* and the first day of the fifth quarter after exit quarter. |
| 15 | Indent the next headings and list on separate rows |  |
| 16 | Employer | ORGANIZATION NAME |
| 17 | ID | ORG\_ID |
| 18 | Address | Format (values from organization’s address): [STREET] [CITY], [STATE] [ZIP CODE] |
| 19 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the placement: First Name, Last Name, Phone Number, Email address |

## ALL PENDING FOLLOW-UPS DISPLAYED BY QUARTER

**(Pending FU by Quarter)**

**Selection Criteria**

Same as ALL PENDING FOLLOW-UPS, with display organized into separate sections by quarter.

**Introduction:** List of all the scheduled dates on the Pending Report organized into separate sections by quarter. The report will organize results using the month of the first day of the quarter (January, April, July, October). The follow-up scheduled dates along with employer information are displayed.

**Instructions:**

**Multiple Sub-Grantee Selection**

Multiple sub-grantees can be selected by holding down the Ctrl button and highlighting the desired sub-grantees. If multiple sub-grantees are selected when the report is run, the report’s outcome will include all records associated with any of the selected sub-grantees.

**Program Year Filter:** At the top of the report, display a drop-down menu showing these values:

2007

2008

2009

Current PY

A) When the user selects one of the program year (numeric) values, in the Selection Criteria for all three Follow-Up types, replace line 8 with the appropriate one of the following conditions.

FU1: *Q1FUED* = *PAST EXPIRATION DATE*

FU2: *Q2Q3FUED* = *PAST EXPIRATION DATE*

FU3: *Q4FUED* = *PAST EXPIRATION DATE*

where *PAST EXPIRATION DATE* is a constructed variable defined as 9/30/[selected program year + 1], e.g., 2008 🡪 9/30/2009

B) When the user selects “Current PY” run this report normally.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Report Month | Listing is by month, starting with month in which report is run  Format: [month] [year] |
| 2 | Number of FU1s | Total number of FU 1s scheduled for this month |
| 3 | Number of FU2s | Total number of FU 2s scheduled for this month |
| 4 | Number of FU3s | Total number of FU 3s scheduled for this month |
| **#** | **Detail-level elements** | |
| 5 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 6 | Exit Date | EXIT DATE |
| 7 | County of Residence | COUNTY |
| 8 | Case Worker | CASE WORKER |
| 9 | FU1 Date | Follow-Up 1 Scheduled Date  **Note:** Do not display this element if the UE doesn’t have a pending Follow-up 1 this month. |
| 10 | FU2 Date | Follow-Up 2 Scheduled Date  **Note:** Do not display this element if the UE doesn’t have a pending Follow-up 2 this month. |
| 11 | FU3 Date | Follow-Up 3 Scheduled Date  **Note:** Do not display this element if the UE doesn’t have a pending Follow-up 3 this month. |
| 12 | Indent the next headings and list on separate rows |  |
| 13 | Employer | ORGANIZATION NAME |
| 14 | ID | ORG\_ID |
| 15 | Address | Format (values from organization’s address): [STREET] [CITY], [STATE] [ZIP CODE] |
| 16 | Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |

## VOLUNTEERISM FOLLOW-UPS

**Selection Criteria**

|  |  |  |
| --- | --- | --- |
| **#** | Specification: | **Annotation:** |
| **0** | List of all Enrollment records **where** | One row on the report for each enrollment |
| **1** | EXIT\_DATEis valued | The person has exited from the program |
| **2** | **AND**  FU VOL COMPLETED DATE is null | The enrollment does not have a completed volunteerism follow-up |
| **3** | **AND**  ENGAGED IN VOLUNTEER WORK ≠ “Y” |
| **4** | **AND**  PRIOR VOL WORK IND≠ “Y” | The person has no prior volunteer work |
| **5** | **AND**  *REPORT RUN DATE* <= *Q1FUED* | The follow-up can impact the year-end QPR |
| **6** | **AND**  *EXCLUDED* = “No” | The enrollment has not been excluded from the performance measures |
| **7** | **AND**  NON\_EXIT\_REASON is null | The enrollment was not closed due to a non-exit reason |
| **8** | **AND**  There is no UE record for this enrollment whereSCSEP\_SERVICES\_90\_DAYS\_IND = “Y” **and** START\_DATE >= EXIT\_DATE | The person has not re-enrolled in SCSEP within the first 90 days after exit. |
| **9** | **AND**  *RE-ENROLLED 90 OTHER RECORD* = “No” |

DISPLAY RULE FOR SCHEDULED DATE: ***FD1QAEQ***

**Introduction:** List of Volunteerism follow-ups. The follow-up scheduled dates along with volunteerism information are displayed.

**Instructions:**

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Alpha-numeric Search field:** LAST NAME of the participant

**Display Sort Order:**

1. When a grantee-wide report is run, group the detail results by sub-grantee, in ascending order by Sub Name.

2. Within each sub-grantee, sort enrollments by LAST NAME in ascending order, and

3. then by FIRST NAME in ascending order.

**Export Instructions:** For each participant that has *more than one* enrollment in the same sub-grantee that meet the Selection Criteria, sort these enrollments in the export file by the most recent FU VOL SCHEDULED DATE, and secondarily by the most recent FU VOL COMPLETED DATE.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Pending Volunteerism Follow-ups | **Count** of enrollmentsthat met the Selection Criteria. |
|  | Number of Completed Volunteerism Follow-ups | **Count** of enrollments **where** FU VOL COMPLETED DATE is valued |
|  | Percentage Of Completed Volunteerism Follow-ups | “Number of Completed Volunteerism Follow-ups”  **divided by**  “Number of Completed Volunteerism Follow-ups” plus “Number of Pending Volunteerism Follow-ups”  Displayed as a percentage rounded to the first decimal place. |
| **#** | **Data-level elements** | |
| 2 | Enrollment (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| 3 | County of Residence | COUNTY |
| 4 | Case Worker | CASE WORKER |
| 5 | Application Date | APPLICATION DATE |
| 6 | Did participant engage in volunteer work during enrollment? | If there is a CSA record for this enrollment where CSA VOL WORK IND = “Y”, display “Yes”. Otherwise, display “No”. |
| 7 | Will participant engage in volunteer work after participation? | If EXIT VOL WORK IND = “Y”, display “Yes”. Otherwise, display “No”. |
| 8 | Exit Date | EXIT DATE |
| 9 | Volunteerism Follow-up Date | FU VOL SCHEDULED DATE |
|  | Volunteerism Follow-up Completed Date | FU\_VOL\_COMPLETED\_DATE |
|  | Is this activity conducted in a SCSEP host agency? | If FU\_VOL\_ACT\_COND\_HA\_IND = “Y”, display “Yes”. Otherwise, display “No” |
|  | Type of Volunteer Organization | FU\_VOL\_ACT\_COND\_TEXT |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Pending Volunteerism Follow-ups: [value]

Number of Completed Volunteerism Follow-ups: [value]

Percentage of Completed Volunteerism Follow-ups: [value]

**RESULTS DETAILS:**

[LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER]

County of Residence: [value]

Case Worker: [value]

Application Date: [value]

Did participant engage in volunteer work during enrollment? [value]

Will participant engage in volunteer work after participation? [value]

Exit Date: [value]

Volunteerism Follow-up Date: [value]

Volunteerism Follow-up Completed Date: [value]

Is this activity conducted in a SCSEP host agency? [value]

Type of Volunteer Organization [value]

[Repeat format for the next enrollment.]

# Group #4: HOST AGENCIES

## HOST AGENCIES

**(Host Agencies)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all Host Agencies that are owned by the selected grantee/sub-grantee | List of all Host Agencies |

Introduction: List of all host agencies in the selected grantee and sub-grantee. The number of active host agencies, the number of participants per host agency, the average time as a host agency, along with host agency information, are displayed.

**Instructions:**

**Active Filters**

There is a checkbox beneath the "Show Results Details" checkbox which is called "Display Active Host Agencies Only". If this box is checked when the report is run, the report’s outcome will include only those records on the report where “Active” is “Y”.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Active Filter:

Record type: host agency

Condition: "Active" = Y

**Alpha-numeric Search field:** ORGANIZATION NAME

**Filters that limit which contacts are displayed:**

Display an option called “Show Currently Active Contacts Only”. If this filter is selected when the report is run, display contacts that are associated with the organizations that meet the Selection Criteria via CSAs under the selected grantee/sub-grantee such that ASSIGNMENT DATE is valued **and** ASSIGNMENT END DATE is null.

Display another option called “Show All Contacts”. If this filter is selected when the report is run, display all contacts that are associated with the organizations that meet the Selection Criteria via CSAs under the selected grantee/sub-grantee.

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary-level elements** | |
| Number of Host Agencies | Total number of host agencies that were selected |
| Number of Active Host Agencies | Total number of host agencies that are active |
| Average Number of Participants Per HA | “Total Number of Participants” **divided by** “Number of Host Agencies” |
| Average Days as Host Agency | Sum of “Length of Time as Host Agency” **divided** **by** “Number of Host Agencies”  **Note:** in denominator, include all active host agencies, and include only the inactive host agencies that have an associated assignment (CSA) record |
| **Detail-level elements** | |
| Name of Host Agency (label not displayed) | ORGANIZATION NAME |
| HA ID | ORG\_ID |
| HA FEIN | FEIN |
| HA Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP] |
| Type | ORGANIZATION TYPE |
| Active | Indicate Y if there exists an assignment (CSA) record associated with the host agency where ASSIGNMENT DATE is valued and (ASSIGNMENT END DATE is null AND EXIT DATE is null)  Else indicate N  **Note:** Only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee. |
| Available | HOST AGENCY CONTINUED AVAILABILITY |
| Date of Host Agency Agreement | DATE OF HOST AGENCY AGREEMENT |
| Number of Current Participants | Total number of participants with an active assignment (CSA) associated with the host agency  **Note:** Only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee. |
| Total Number of Participants | Total number of participants with an assignment (CSA) associated with the host agency  **Note:** Only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee. |
| Length of Time as Host Agency | For Active host agencies: number of days between earliest associated ASSIGNMENT DATE and *REPORT RUN DATE* (inclusive)  For all other host agencies: number of days between earliest associated ASSIGNMENT DATE and latest associated END\_DATE (inclusive)  where “END\_DATE” is a constructed variable defined for each assignment as follows.  i) Let “END\_DATE” = ASSIGNMENT END DATE.  ii) If (ASSIGNMENT DATE = the latest associated ASSIGNMENT DATE **and** ASSIGNMENT END DATE is null), then “END\_DATE” = the EXIT DATE from the assignment’s enrollment.  **Note:** This handles situations where ASSIGNMENT DATE = the latest associated ASSIGNMENT DATE for multiple assignments.  **Note:** If value < 0, display no value **and** do not include in average.  **Note:** Only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee. |
| Contacts | Format (values from contact record):  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [STREET 1]  [STREET 2]  [CITY], [STATE] [ZIP CODE]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  If more than one contact needs to be shown for this organization, sort them by CONTACT LAST NAME in ascending order, then by CONTACT FIRST NAME in ascending order.  Display this element on the right side of the report.  In the export file, list these values in individual columns named “Contact First Name”, “Contact Last Name”, “Contact Street Address 1”, “Contact Street Address 2”, “Contact City”, “Contact State”, “Contact Zip Code”, “Contact Phone Number”, “Contact E-mail address”, respectively. |

## ASSIGNMENTS BY HOST AGENCY

**(Assignments by HA)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all Host Agencies that have an assignment (CSA) record associated with the selected grantee/sub-grantee | List of all Host Agencies |

**Display Note:** This report has three tiers. The first is a report level summary, describing all of the community service assignment forms in the grantee/sub-grantee. The second is host agency level data, which describes attributes of community service assignment forms with the particular host agency. The third is community service assignment level data, where the attributes of individual community service assignment forms are shown.

**Selection Note:** This report is a list of community service assignment forms, organized by host agency, with other sorting / grouping criteria enumerated below.

**Introduction:** List of all participants who have at least one associated host agencies in the selected grantee and sub-grantee. The active status of the assignment and the length of the assignment, along with host agency, contact and supervisor information, are displayed.

**Instructions:**

**Active Filters**

There are two checkboxes beneath the "Show Results Details" checkbox, which are called "Display Active Host Agencies Only” and “Display Active Assignments Only ". If the first box is checked when the report is run, the report’s outcome will include only those records on the report where the host agency has at least one active assignment. If the second box is checked when the report is run, the report’s outcome will include only those records on the report where "Active Assignment" is “Y”.

**Separate row for each participant assigned to a host agency**

**Sort order:**

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name)

2. Group by host agencies (active/inactive status. active first)

3. Within each group, sort host agencies in alphabetical order by Name

4. Under each host agency, group by CSAs (active/inactive status, active first)

5. Within each group, sort CSAs by participant’s Last Name and First Name

Active Filter (1):

Record type: host agency

Condition: host agency has at least one CSA record in the selected grantee/sub-grantee where "Active Assignment" = Y

Active Filter (2):

Record type: assignment (CSA)

Condition: "Active assignment" = Y

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Report summary-level elements** | |
| Number of Host Agencies | Total number of host agencies that were selected |
| Number of Active Host Agencies | Total number of host agencies with an “Active Assignment” |
| Average Number of Participants | Sum of (“Number of Active Participants” + “Number of Inactive Participants”) / “Number of Host Agencies” |
| Average Length of Assignment | Sum of “Length of Assignment” **divided by** “Number of Assignments” |
| **Organization summary-level elements** | |
| Name of host agency (label not displayed) | ORGANIZATION NAME |
| HA ID | ORG\_ID |
| HA FEIN | FEIN |
| HA Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP] |
| Type | ORGANIZATION TYPE |
| Number of Active Participants | Under each host agency, total number of participants with at least one active assignment (CSA) that is associated with the selected grantee/sub-grantee |
| Number of Inactive Participants | Under each host agency, total number of participants with no active assignments (CSAs)  **Note:** Only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee for this count. |
| **Detail-level elements** | |
| Participant | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| County of Residence | COUNTY |
| Case Worker | CASE WORKER |
| Active Assignment | Indicate Y if ASSIGNMENT DATE is valued AND (ASSIGNMENT END DATE is null AND EXIT DATE is null)  Else indicate N  **Note:** only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee |
| Participant’s Job Code | PARTICIPANT'S JOB CODE |
| Length of Assignment | For Active Assignments: number of days between ASSIGNMENT DATE and *REPORT RUN DATE* (inclusive)  For all other assignments (CSAs): number of days between ASSIGNMENT DATE and ASSIGNMENT END DATE (use EXIT DATE if ASSIGNMENT END DATE is null) (inclusive)  **Note:** if value < 0, display no value **and** do not include in average  **Note:** only consider assignments (CSAs) that are associated with the selected grantee/sub-grantee |
| Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the CSA: First Name, Last Name, Phone Number, Email address |
| Participant’s Schedule | PARTICIPANT'S SCHEDULE |

# Group #5: EMPLOYERS

## UNSUBSIDIZED EMPLOYERS

**(Employers)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all Employers that are owned by the selected grantee/sub-grantee | List of all Employers |

**Introduction:** List of all employers in the selected grantee and sub-grantee. The number of active employers, participants per employer, the average time as an employer, along with employer information, are displayed.

**Instructions:**

**Active Filters**

There is a checkbox beneath the "Show Results Details" checkbox, which is called "Display Active Employers Only". If this box is checked when the report is run, the report’s outcome will include only those records on the report where “Active” is “Y”.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Active Filter:

Record type: employer

Condition: "Active" = Y

**Alpha-numeric Search field:** ORGANIZATION NAME

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary-level elements** | |
| Number of Employers | Total number of employers that were selected |
| Number of Active Employers | Total number of employers that are active |
| Average Number of Participants Per Employer | “Total Number of Participants” **divided by** “Number of Employers” |
| Average Number of Program Years as Employer | Sum of “Number of Program Years Employer Has Had Placements” **divided by** “Number of Employers”  **Note:** in denominator, include all active employers, and include only the inactive employers that have an associated placement (UE) record |
| **Detail-level elements** | |
| Name of Employer (label not displayed) | ORGANIZATION NAME |
| Employer ID | ORG\_ID |
| Employer FEIN | FEIN |
| Employer Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP] |
| Type | ORGANIZATION TYPE |
| Active | Indicate Y if there exists a placement (UE) record associated with the employer where  EXIT DATE is valued **AND** PLACEMENT START DATE is valued **AND** FIRST\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  SECOND\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  THIRD\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  FOURTH\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  the enrollment associated with this UE  (*EXCLUDED* = “No” **AND**  EXCLUSION\_DATE is null or >= *FD5QAEQ* **AND**  there is no UE record for this enrollment where FOURTH\_QTR\_WAGES\_TEXT = “viii\_Excluded“)  **AND**  *REPORT RUN DATE* <= *Q2Q3FUED*  Else indicate N  **Note:** only consider placements (UEs) that are owned by the selected grantee/sub-grantee |
| Available | EMPLOYER CONTINUED AVAILABILITY |
| Number of Current Participants | Total number of participants with an active placement (UE) associated with the employer  **Note:** only consider placements (UEs) that are associated with the selected grantee/sub-grantee |
| Total Number of Participants | Total number of participants with a placement (UE) associated with the employer  **Note:** only consider placements (UEs) that are associated with the selected grantee/sub-grantee |
| Number of Program Years Employer Has Had Placements | Total number of program years for which employer has had at least one associated placement (UE). Each UE should be counted only in the program year in which the PLACEMENT START DATE falls.  **Note:** if value < 0, display no value **and** do not include in average  **Note:** only consider placements (UEs) that are associated with the selected grantee/sub-grantee |
| Host Agency | Indicate Y if there is at least one UE record with the employer where EMPLOYER IS HOST AGENCY = Y  Else indicate N |
| OJE | Indicate Y if there is at least one UE record with the employer where DID EMPLOYER PROVIDE OJE TRAINING SITE? = Y  Else indicate N |
| Date of Last Customer Service Survey | the latest CSS Survey Date (U23.2, U24.2, U25.2) from all UE records that use this employer **where**  ORG\_TYPE <> Self-Employment **and**  SUB\_GRANTEE\_SERVICE\_IND = Y **and**  HOST\_AGENCY\_IND (UE) <> Y |

## PLACEMENTS BY EMPLOYER

**(Placements by ER)**

Selection Criteria

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all Employers that have a placement (UE) record associated with the selected grantee/sub-grantee | List of all Employers |

**Display Note:** This report has three tiers. The first is a report level summary, describing all of the unsubsidized employment forms in the grantee/sub-grantee. The second is employer level data, which describes attributes of unsubsidized employment forms with the particular employer. The third is unsubsidized employment level data, where the attributes of individual unsubsidized employment forms are shown.

**Selection Note:** This report is a list of unsubsidized employment forms, organized by employer, with other sorting / grouping criteria enumerated below.

**Introduction:** List of all participants who have at least one associated employer in the selected grantee and sub-grantee. The active status of the placement and the length of the placement, along with employer, contact and supervisor information, are displayed.

**Instructions:**

**Active Filters**

There are two checkboxes beneath the "Show Results Details" checkbox which are called "Display Active Employers Only” and “Display Active Placements Only ". If the first box is checked when the report is run, the report’s outcome will include only those records on the report where the employer has at least one active placement. If the second box is checked when the report is run, the report’s outcome will include only those records on the report where "Active Placement" is “Y”.

**Separate row for each participant assigned to an employer**

**Sort order:**

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name)

2. Group by employers (active/inactive status. active first)

3. Within each group, sort employers in alphabetical order by Name

4. Under each employer, group by UEs (active/inactive status, active first)

5. Within each group, sort UEs by participant’s Last Name and First Name

Active Filter (1):

Record type: employer

Condition: employer has at least one UE record in the selected grantee/sub-grantee where "Active Placement" = Y

Active Filter (2):

Record type: placement (UE)

Condition: "Active Placement" = Y

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Report summary-level elements** | |
| Number of Employers | Total number of employers that were selected |
| Number of Active Employers | Total number of employers that have an “Active Placement” |
| Average Number of Participants Per Employer | Count of distinct participants **divided by** count of distinct employers |
| **Organization summary-level elements** | |
| Name of employer | ORGANIZATION NAME |
| Employer ID | ORG\_ID |
| FEIN | FEIN |
| Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP] |
| Type | ORGANIZATION TYPE |
| Number of Active Participants | Under each employer, total number of participants with at least one associated “Active Placement”  **Note:** Only consider placements (UEs) that are associated with the selected grantee/sub-grantee for this count. |
| Number of Inactive Participants | Under each employer, total number of participants with no associated “Active Placement”  **Note:** Only consider placements (UEs) that are associated with the selected grantee/sub-grantee for this count. |
| Percent Achieving Entered Employment | Under each employer, total number of enrollments where  there is a UE record  associated with this employer  **AND**  FIRST\_QTR\_WAGES\_TEXT = *“YES”*  **AND**  *REPORT RUN DATE* is >= *FD1QAEQ*  **DIVIDED BY**  Total number of enrollments where  there is a UE record  associated with this employer  **AND**  *REPORT RUN DATE* is >= *FD1QAEQ* |
| Percent Achieving Retention | Under each employer, total number of enrollments where  there is a UE record  associated with this employer  **AND**  FIRST\_QTR\_WAGES\_TEXT = *“YES”*  **AND**  there is a UE record  associated with this employer  **AND**  SECOND\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If SECOND\_QTR\_WAGES\_TEXT = null, SECOND\_QTR\_WAGES\_AMT > 0  **AND**  there is a UE record  associated with this employer  **AND**  THIRD\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If THIRD\_QTR\_WAGES\_TEXT = null, THIRD\_QTR\_WAGES\_AMT > 0  AND  *REPORT RUN DATE* is >= *FD4QAEQ*  DIVIDED BY  Total number of enrollments where  there is a UE record  associated with this employer  AND  FIRST\_QTR\_WAGES\_TEXT = *“YES”*  AND  *REPORT RUN DATE* is >= *FD4QAEQ* |
| **Detail-level elements** | |
| Participant | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) |
| County of Residence | COUNTY |
| Case Worker | CASE WORKER |
| Placement Start Date | START DATE |
| Active | Indicate Y if EXIT DATE is valued **AND** PLACEMENT START DATE is valued **AND** FIRST\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  SECOND\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  THIRD\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND**  FOURTH\_QTR\_WAGES\_TEXT <> “vii\_Unable” **AND** the enrollment associated with this UE  (*EXCLUDED* = “No” **AND**  EXCLUSION\_DATE is null or >= *FD5QAEQ* **AND**  there is no UE record for this enrollment where FOURTH\_QTR\_WAGES\_TEXT = “viii\_Excluded“)  **AND**  *REPORT RUN DATE* <= *Q2Q3FUED*  Else indicate N  **Note:** only consider placements (UEs) that are associated with the selected grantee/sub-grantee |
| Host Agency | Indicate Y if there is at least one UE record with the organization where EMPLOYER IS HOST AGENCY = Y  Else indicate N |
| OJE | Indicate Y if there is at least one UE record with the organization where DID EMPLOYER PROVIDE OJE TRAINING SITE? = Y  Else indicate N |
| Participant’s Job Code | PARTICIPANT'S JOB CODE from UE record |
| Length of Placement | Indicate “Retention at 1 Year” if this UE record has  FOURTH\_QTR\_WAGES\_TEXT = *“YES”*  Else indicate “Retention” if this UE record has  SECOND\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If SECOND\_QTR\_WAGES\_TEXT = null, SECOND\_QTR\_WAGES\_AMT > 0  **AND**  THIRD\_QTR\_WAGES\_TEXT = *“YES”*  **OR**  If THIRD\_QTR\_WAGES\_TEXT = null, THIRD\_QTR\_WAGES\_AMT > 0  Else indicate “Entered Employment” if this UE record has  FIRST\_QTR\_WAGES\_TEXT = *“YES”*  Else show nothing |
| Contact  (Indent the next headings and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the placement (UE): First Name, Last Name, Phone Number, Email address |

# Group #6: ACTIONS

In the report summary for the next two reports, show four checkboxes next to the "Show Results" checkboxes. These four checkboxes will be called “IEP”, “Recertification”, “Physical or Waiver”, and “Safety Consultation”, respectively. If none of these checkboxes are checked when the report is run, display a message saying “You must select at least one Action to display.”

|  |  |  |
| --- | --- | --- |
| **If this box is checked when the report is run** | **then set this constructed variable.** | **Otherwise, set it to** |
| IEP | *IEP IND* = Y | *IEP IND* = N |
| Recertification | *RECERT IND* = Y | *RECERT IND* = N |
| Physical or Waiver | *PHYS IND* = Y | *PHYS IND* = N |
| Safety Consultation | *SAFE CON IND* = Y | *SAFE CON IND* = N |

## PARTICIPANT ACTIONS

**(Pant Actions)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of enrollments where | List of enrollments where |
| *INITIAL ASSIGNMENT DATE* is valued | the participant has been assigned to community service |
| **AND**  EXIT DATE is null | **and**  the participant has not exited |

**Filter Date field:** *INITIAL ASSIGNMENT DATE*

Display “Initial Assignment Date From (mm/dd/yyyy)” and “Initial Assignment Date To (mm/dd/yyyy)” next to the associated Filter Date fields.

**Alpha-numeric Search field:** PARTICIPANT LAST NAME

**Introduction:** List of all participants with active enrollments in SCSEP. For each enrollment, the last updated date and due date for the following actions are provided: IEP, recertification, physical or waiver, and safety consultation.

**Instructions: Date Filters for Initial Assignment Date**

There are two text boxes called "Initial Assignment Date From” and “Initial Assignment Date To". If either/both of these dates are valued when the report is run, the report’s outcome will include only those records whose Initial Assignment Date falls within the date range.

**Alpha Search Links**

Displayed beneath the sub-grantee name is a row of all distinct characters that appear as the first character in the “Alphabet Search” field from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Filters that limit the records by which set of Selection Criteria they meet

There are four check boxes displayed below the “Show Results” checkboxes called “IEP”, “Recertification”, “Physical or Waiver”, and “Safety Consultation”, respectively. At least one of these checkboxes must be selected for the report to run. These checkboxes will determine whether a particular action appears in the summary table, in the details table and in the export. When the “Safety Consultation” checkbox is selected, enrollments associated with multiple assignments are not displayed.

**Sort order**:

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name).

2. Within each sub-grantee, sort by Intial Asssignment Date in ascending order.

**Sort order (export file):**

1. Sort by Initial Assignment Date in ascending order.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary-level elements** | |
| 1 | Number of Enrollments | **Count** of enrollments that met the Selection Criteria |
| 2 | Number of Actions Pending | **Sum** of  “Number of IEPs Pending” (use 0 when *IEP IND* = N)  **AND**  “Number of Recertifications Pending” (use 0 when *RECERT IND* = N)  **AND**  “Number of Physicals or Waivers Pending” (use 0 when *PHYS IND* = N)  **AND**  “Number of Safety Consultations Pending” (use 0 when *SAFE CON IND* = N) |
| 3 | Number of Actions Past Due | **Sum** of  “Number of IEPs Past Due” (use 0 when *IEP IND* = N)  **AND**  “Number of Recertifications Past Due” (use 0 when *RECERT IND* = N)  **AND**  “Number of Physicals or Waivers Past Due” (use 0 when *PHYS IND* = N)  **AND**  “Number of Safety Consultations Past Due” (use 0 when *SAFE CON IND* = N) |
| Display the next two elements only when *IEP IND* = Y | | |
| 4 | Number of IEPs Pending | **Count** of enrollments that met the Selection Criteria where “Due Date of Next IEP” >= *REPORT RUN DATE* |
| 5 | Number of IEPs Past Due | **Count** of enrollments that met the Selection Criteria where “Due Date of Next IEP” < *REPORT RUN DATE* |
| Display the next two elements only when *RECERT IND* = Y | | |
| 6 | Number of Recertifications Pending | **Count** of enrollments that met the Selection Criteria where “Due Date of Next Recertification” >= *REPORT RUN DATE* |
| 7 | Number of Recertifications Past Due | **Count** of enrollments that met the Selection Criteria where “Due Date of Next Recertification” < *REPORT RUN DATE* |
| Display the next two elements only when *PHYS IND* = Y | | |
| 8 | Number of Physicals or Waivers Pending | **Count** of enrollments that met the Selection Criteria where “Due Date of Next Physical or Waiver” >= *REPORT RUN DATE* |
| 9 | Number of Physicals or Waivers Past Due | **Count** of enrollments that met the Selection Criteria where “Due Date of Next Physical or Waiver” < *REPORT RUN DATE* |
| Display the next two elements only when *SAFE CON IND* = Y | | |
| 10 | Number of Safety Consultations Pending | **Count** of enrollments that met the Selection Criteria and have at least one CSA where “Due Date of Next Safety Consultation” >= *REPORT RUN DATE* |
| 11 | Number of Safety Consultations Past Due | **Count** of enrollments that met the Selection Criteria and have at least one CSA where “Due Date of Next Safety Consultation” < *REPORT RUN DATE* |
| **#** | **Enrollment-detail-level elements** | |
| 12 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”) [PARTICIPANT EMAIL ADDRESS]  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, “Home Phone Number”, and “Email” respectively.) |
| 13 | County of Residence | COUNTY |
| 14 | Case Worker | CASE WORKER |
| 15 | Initial Assignment Date | *INITIAL ASSIGNMENT DATE* |
| Display the next two elements only when *IEP IND* = Y | | |
| 16 | IEP Status | If “Due Date of Next IEP” is null, then display “blank”  Else, if “Due Date of Next IEP” < *REPORT RUN DATE* then “Past due”  Otherwise, “Pending” |
| 17 | Date of Last IEP | If LAST IEP DATE is null, then display “blank”  Otherwise, LAST IEP DATE |
| 18 | Due Date of Next IEP | If LAST IEP DATE is null, then display *INITIAL ASSIGNMENT DATE* **plus** 6 months  Otherwise, LAST IEP DATE **plus** 6 months |
| Display the next two elements only when *RECERT IND* = Y | | |
| 19 | Recertification Status | If “Due Date of Next Recertification” is null, then display “blank”  Else, if “Due Date of Next Recertification” < *REPORT RUN DATE* then “Past due”  Otherwise, “Pending” |
| 20 | Date of Recertification | If RECERT DIRECTOR SIG DATE is null, then display “blank”  Otherwise, RECERT DIRECTOR SIG DATE |
| 21 | Due Date of Next Recertification | If (RECERT DIRECTOR SIG DATE is null **and** ELIGIBILITY DETERMINATION DATE is null), then *INITIAL ASSIGNMENT DATE* **plus** 1 year.  Else, if RECERT DIRECTOR SIG DATE is null, then ELIGIBILITY DETERMINATION DATE **plus** 1 year.  Otherwise, RECERT DIRECTOR SIG DATE **plus** 1 year. |
| Display the next two elements only when *PHYS IND* = Y | | |
| 22 | Physical or Waiver Status | If “Due Date of Next Physical or Waiver” is null then display “blank”  Else, if “Due Date of Next Physical or Waiver” < *REPORT RUN DATE* then “Past due”  Otherwise, “Pending” |
| 23 | Date of Last Physical or Waiver | If LAST PHYSICAL/WAIVER DATE is null, then display “blank”  Otherwise, LAST PHYSICAL/WAIVER DATE |
| 24 | Due Date of Next Physical or Waiver | If LAST PHYSICAL/WAIVER DATE is null, then display APPLICATION DATE **plus** 1 year  Otherwise, LAST PHYSICAL/WAIVER DATE **plus** 1 year. |
| **#** | **Assignment-detail-level elements --** Display this section only when *SAFE CON IND* = Y, and display this section’s info for assignments where ASSIGNMENT END DATE is null | |
| 25 | Assignment Date | If there is no assignment for this enrollment where ASSIGNMENT\_END\_DATE is null, then display “N/A – No Active Assignment”.  Otherwise, ASSIGNMENT DATE |
| 26 | Safety Consultation Status | If there is no assignment for this enrollment where ASSIGNMENT\_END\_DATE is null, then display “N/A”.  Else, if “Due Date of Next Safety Consultation” < *REPORT RUN DATE* then “Past due”  Otherwise, “Pending” |
| 27 | Date of Safety Consultation | If there is no assignment for this enrollment ASSIGNMENT\_END\_DATE is null, then display “N/A”.  Else if SAFETY CONSULTATION DATE is null, then display “blank”  Otherwise, SAFETY CONSULTATION DATE |
| 28 | Due Date of Next Safety Consultation | If there is no assignment for this enrollment where ASSIGNMENT\_END\_DATE is null, then display “N/A”.  Else if SAFETY CONSULTATION DATE is null, then ASSIGNMENT DATE **plus** 1 year.  Otherwise, SAFETY CONSULTATION DATE **plus** 1 year |
| 29 | Host Agency Name | If there is no assignment for this enrollment where ASSIGNMENT\_END\_DATE is null, then display “N/A”.  Otherwise, ORGANIZATION NAME |
| 30 | HA Address | If there is no assignment for this enrollment where ASSIGNMENT\_END\_DATE is null, then display “N/A”.  Otherwise, Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP]  (In the export file, list these values in individual columns named “HA Street Address”, “HA City”, “HA State”, and “HA Zip Code”, respectively.) |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Enrollments [value]

Number of Actions Pending [value]

Number of Actions Past Due [value]

Number of IEPs Pending [value]

Number of IEPs Past Due [value]

Number of Recertifications Pending [value]

Number of Recertifications Past Due [value]

Number of Physicals or Waivers Pending [value]

Number of Physicals or Waivers Past Due [value]

Number of Safety Consulations Pending [value]

Number of Safety Consultations Past Due [value]

---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

**RESULTS DETAILS:**

**Note**: Display data elements in export file in same order shown below

**[Participant]**

County of Residence: [value] Case Worker: [value]

Initial Assignment Date: [value]

Status of IEP: [value] Status of Recertification: [value]

Date of Last IEP: [value] Date of Recertification: [value]

Due Date of Next IEP: [value] Due Date of Next Recertification: [value]

Status of Physical or Waiver: [value] Assignment Date: [value]

Date of Last Physical or Waiver: [value] Host Agency Name: [value]

Due Date of Next Physical or Waiver: [value] HA Address: [value]

Status of Safety Consultation: [value]

Date of Safety Consultation: [value]

Due Date of Next Safety Consultation: [value]

## PARTICIPANT ACTIONS, DISPLAYED BY MONTH

**(Pant Actions Month)**

**Selection Criteria**

Same as PARTICIPANT ACTIONS, with display organized into separate sections by month.

Specifications for Displayed Data Elements

|  |  |
| --- | --- |
| **Report-Level Summary Elements:** | |
| Grantee/Code | GRANTEE NAME and GRANTEE CODE together |
| Sub-grantee/Code | SUB-GRANTEE NAME and SUB-GRANTEE CODE together |
| **Month-Level Summary Elements:** | |
| Report month | Listing is by month; show only those months where at least one enrollment has a Due Date within the month |
| Use the calculations in lines 4 through 11 in the PARTICIPANT ACTIONS report’s “Displayed Data Elements” here  **Note:** for each month, include in these calculations only those enrollments that have an associated Due Date within the month | |
| **Enrollment-Level Detail Elements:** | |
| Use the calculations in lines 16 through 21 in the PARTICIPANT ACTIONS report’s “Displayed Data Elements” here  **Note:** for each month, include in these calculations only those enrollments that have an associated Due Date within the month | |

## HOST AGENCY

In the report summary for the Host Agency Actions Report and the Host Agency Actions Displayed by Month report, two checkboxes are shown next to the "Show Results" checkboxes. These two checkboxes are called “Host Agency Agreement”, and “Host Agency Monitoring Visit,” respectively. If none of these checkboxes are checked when the report is run, a message is displayed saying “You must select at least one action to display.”

|  |  |  |
| --- | --- | --- |
| **If this box is checked when the report is run** | **then set this constructed variable** | **Otherwise, set it to** |
| Host Agency Agreement | *HA\_IND* = Y | *HA\_IND* = N |
| Host Agency Monitoring Visit | *MON\_VISIT\_IND* = Y | *MON\_VISIT\_IND* = N |

## HOST AGENCY ACTIONS

**(HA Actions)**

**Selection Criteria**

|  |  |  |
| --- | --- | --- |
| **#** | **Specification:** | **Annotation:** |
| 1 | List of all Host Agencies that have at least one community service assignment record associated with the selected grantee/sub-grantee where | List of all Host Agencies that have at least one community service assignment associated with the grantee/sub grantee |
| 2 | ASSIGNMENT DATE is valued | that is active |
| **3** | **AND**  ASSIGNMENT END DATE is null |

**Alpha-numeric Search field:** ORGANIZATION NAME

**Introduction:** List of all active host agencies associated with the grantee and sub-grantee selected. For each host agency, the last updated date and due date of the following actions are provided: Host Agency Agreement and Host Agency Monitoring Visit. A host agency is considered active if there is at least one open community service assignment associated with the organization.

**Alpha Search Links**

Displayed beneath the sub-grantee name is a row of all distinct characters that appear as the first character in the “Alphabet Search” field from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

Filters that limit the records by which set of Selection Criteria they meet

There are two check boxes displayed below the “Show Results” checkboxes called “Host Agency Agreement” and “Host Agency Monitoring Visit” respectively. At least one of these checkboxes must be selected for the report to run. These checkboxes will determine whether a host agency action appears in the summary table, in the details table and in the export.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary Elements:** | |
| 1 | Number of Host Agencies | **Count** of host agencies that were selected |
| 2 | Number of Actions Pending | **Sum** of  “Number of Host Agency Agreements Pending” (use 0 when *HA\_IND* = N)  **AND**  “Number of Monitoring Visits Pending” (use 0 when *MON\_VISIT\_IND* = N) |
| 3 | Number of Actions Past Due | **Sum** of  “Number of Host Agency Agreements Past Due” (use 0 when *HA\_IND* = N)  **AND**  “Number of Monitoring Visits Past Due” (use 0 when *MON\_VISIT\_IND* = N) |
| Display the next two elements only when *HA\_IND* = Y (See details section for definitions) | | |
| 4 | Number of Host Agency Agreements Pending | **Count** of host agencies where “Due Date of Next Host Agency Agreement” >= *REPORT RUN DATE* |
| 5 | Number of Host Agency Agreements Past Due | **Count** of host agencies where “Due Date of Next Host Agency Agreement” < *REPORT RUN DATE* |
| Display the next two elements only when *MON\_VISIT\_IND* = Y(See details section for definitions) | | |
| 6 | Number of Monitoring Visits Pending | **Count** of host agencies where “Due Date of Next Monitoring Visit” >= *REPORT RUN DATE* |
| 7 | Number of Monitoring Visits Past Due | **Count** of host agencies where “Due Date of Next Monitoring Visit” < *REPORT RUN DATE* |
| **#** | **Detail Elements** | |
| 8 | Host Agency Name | ORGANIZATION NAME |
| 9 | Host Agency ID | ORG\_ID |
| 10 | Type | ORG TYPE |
| 11 | Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP]  (In the export file, list these values in individual columns named “HA Street Address”, “HA City”, “HA State”, and “HA Zip Code”, respectively.) |
| 12 | Available | AVAILABILITY IND |
| Display the next two elements only when *HA\_IND* = Y | | |
| 13 | Date of Last Host Agency Agreement | If HA\_AGREEMENT\_DATE is null, then “blank”  Otherwise, HA AGREEMENT DATE |
| 14 | Due Date of Next Host Agency Agreement | If HA AGREEMENT DATE is null, then the earliest ASSIGNMENT DATE **plus** 365 days from all assignments associated with the Host Agency where:  ASSIGNMENT DATE is valued  **AND**  ASSIGNMENT END DATE is null  Otherwise HA AGREEMENT DATE **plus** 365 days |
| Display the next two fields only when *MON\_VISIT\_IND* =Y | | |
| 15 | Date of Last Monitoring Visit | If HA\_MONITORING\_DATE is null, then “blank”  Otherwise, HA MONITORING DATE |
| 16 | Due Date of Next Monitoring Visit | If HA MONITORING DATE is null, then the earliest ASSIGNMENT DATE **plus** 365 days from all assignments associated with the Host Agency where:  ASSIGNMENT DATE is valued  **AND**  ASSIGNMENT END DATE is null  Otherwise, HA MONITORING VISIT **plus** 365 days |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Number of Host Agencies: [value]

Number of Actions Pending: [value]

Number of Actions Past Due: [value]

Number of Host Agency Agreements Pending: [value]

Number of Host Agency Agreements Past Due: [value]

Number of Monitoring Visits Pending: [value]

Number of Monitoring Visits Past Due: [value]

**RESULTS DETAILS:**

**Note**: Display data elements in export file in same order shown below

[Host Agency Name]

Host Agency ID: [value]

Type: [value]

Address: [value]

Available: [value]

Date of Last Host Agency Agreement: [value]

Due Date of Next Host Agency Agreement: [value]

Date of Last Monitoring Visit: [value]

Due Date of Next Monitoring Visit: [value]

## HOST AGENCY ACTIONS, DISPLAYED BY MONTH

**(HA Actions Month)**

**Selection Criteria**

Same as HOST AGENCY ACTIONS, with display organized into separate sections by month.

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Report-Level Summary Elements:** | |
| Grantee/Code | GRANTEE NAME and GRANTEE CODE together |
| Sub-grantee/Code | SUB-GRANTEE NAME and SUB-GRANTEE CODE together |
| **Month-Level Summary Elements** | |
| Report Month | Listing is by month; show only those months where at least one host agency has a Due Date within the month |
| Use the calculations in lines 6 through 11 in the Host Agency Actions report’s “Displayed Data Elements” here  **Note:** for each month, include in these calculations only those host agencies that have an associated Due Date within the month | |
| **Enrollment-Level Detail Elements:** | |
| Use the calculations in lines 13 through 24 in the Host Agency Actions report’s “Displayed Data Elements” here  **Note:** for each month, include in these calculations only those host agencies that have an associated Due Date within the month | |

## PENDING EMPLOYER SURVEYS

**(Pending Emp Surveys)**

**Selection Criteria**

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all Employers that have at least one placement (UE) record associated with the selected grantee/sub-grantee where | List of employers that have at least one placement associated with the grantee/sub-grantee where |
| PLACEMENT START DATE is valued | The placement is active |
| **AND**  PLACEMENT START DATE >= *SURVEY ELIGIBLE DATE*  **minus** 100 days  **OR**  *SURVEY ELIGIBLE DATE* is null | The placement is eligible for a survey based on its relationship to the last completed survey date or the employer has not been surveyed |
| **AND**  O ORG TYPE (UE) ≠ Self-Employment | The employer type is not self-employment |
| **AND**  PLACEMENT START DATE <= *REPORT RUN DATE* | The placement is less than or equal to the date the report is run |
| **AND**  *REPORT RUN DATE* **minus** PLACEMENT START DATE < 100 | The placement started within 100 days from when the report is run |
| **AND**  HOST\_AGENCY\_IND (UE) ≠ Y | The employer is not a host agency |
| **AND**  *SURVEY ELIGIBLE DATE* <= *REPORT RUN DATE*  **OR**  *SURVEY ELIGIBLE DATE* is null | The employer does not have a placement that received a customer satisfaction survey within the period of eligibility or the employer has not been surveyed |
| **AND**  SUB\_GRANTEE\_SERVICE\_IND = Y | And employer has a placement which is the result of a substantial service provided to by the sub-grantee |
| **AND**  The placement (UE) record with the earliest PLACEMENT START DATE of all placement (UE) records that satisfy the above selection criteria with this Employer in any grantee/sub-grantee is associated with the selected grantee/sub-grantee | And there is no other placement with this employer in any other grantee/sub-grantee that started earlier and has a pending employer survey. |

**Note:** In cases where multiple placements have the same start date and meet all other selection criteria, use the earliest entered record.

**Alpha-numeric Search field:** ORGANIZATION NAME

**Introduction:** List of all qualified employers in SPARQ that have not received a customer satisfaction survey within the last 365 days. Qualified employers are those where the placement is not self-employment, the employer has not acted as a host agency, the placement is the result of a substantial service provided by the sub-grantee of which the employer is aware.

**Alpha Search Links**

Displayed beneath the sub-grantee name is a row of all distinct characters that appear as the first character in the “Alphabet Search” field from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Sort order**:

1. Group by sub-grantee (when a grantee-wide report is run, in alphabetical order by Name).

2. Within each sub-grantee, sort employers by Number of Days from Placement Start Date in descending order.

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| **#** | **Summary Elements** | |
| 1 | Total Number of Employers with Pending Employer Survey | Total number of employers that were selected |
| 2 | Number of Employers where Pending Employer Survey is between 1 and 20 days from expiration | **Count** of Employers where “Number of Days from Placement Start Date“ is between 81 days and 100 days (inclusive) |
| 3 | Number of Employers where Pending Employer Survey is between 21 and 60 days from expiration | **Count** of Employers where “Number of Days from Placement Start Date“ is between 41 days and 80 days (inclusive) |
| 4 | Number of Employers where Pending Employer Survey is between 61 and 80 days from expiration | **Count** of Employers where “Number of Days from Placement Start Date“ is between 21 days and 40 days (inclusive) |
| 5 | Number of Employers where Pending Employer Survey is between 81 and 100 days from expiration | **Count** of Employers where “Number of Days from Placement Start Date“ is between 1 day and 20 days (inclusive) |
| 6 | **ORG-Level Detail Elements:** | |
| 7 | Name of Employer | ORGANIZATION NAME (UE) |
| 8 | Employer ID | ORG\_ID |
| 9 | Employer Address | Format (values from organization’s address): [STREET], [CITY], [STATE] [ZIP] |
| 10 | Contact  (Indent the next items and list on separate rows) | Format for Contact data:  [CONTACT FIRST NAME] [CONTACT LAST NAME]  [CONTACT PHONE] (if valued, formatted as “(###) ###-####”)  [CONTACT EMAIL] (if valued, make value hyperlink to email address)  **Note:** After CONTACT LAST NAME:  show “(contact person/supervisor)” if only Contact data are displayed  show “(contact person)” if Contact data and Supervisor data are displayed  else show nothing  Format for Supervisor data:  [SUPERVISOR FIRST NAME] [SUPERVISOR LAST NAME]  [SUPERVISOR PHONE] (if valued, formatted as “(###) ###-####”)  [SUPERVISOR EMAIL] (if valued, make value hyperlink to email address)  **Note:** After SUPERVISOR LAST NAME:  show “(supervisor)” if Supervisor data are displayed  else show nothing  **Note:** Only display Supervisor data if at least one of these fields has different values between the Contact and Supervisor records associated with the UE: First Name, Last Name, Phone Number, Email address |
| 11 | Type | ORG TYPE (UE) |
| 12 | Available | AVAILABILITY IND (UE) |
| 13 | Date on which Employer was last Surveyed | If *SURVEY ELIGIBLE DATE* is null, then display “blank”. Else, the latest CSS Survey Date from all UE records that use this Employer where:  O ORG TYPE (UE) ≠ Self-Employment **AND**  SUB\_GRANTEE\_SERVICE\_IND = Y **AND**  HOST\_AGENCY\_IND (UE) ≠ Y |
| 14 | Date of Placement for Pending Employer Survey | The earliest PLACEMENT START DATE from all placements associated with the Grantee/Sub-grantee and Employer that satisfy the Selection Criteria. |
| 15 | Number of Days from Placement Start Date | **Count** of days between *REPORT RUN DATE* and the earliest PLACEMENT START DATE from all placements associated with the Grantee/Sub-grantee and Employer that satisfy the Selection Criteria (inclusive) |
| 16 | Last Date to Deliver Employer Survey | The earliest PLACEMENT START DATE from all placements associated with the Grantee/Sub-grantee and Employer that satisfy the Selection Criteria **plus** 100 days |
| 17 | Participant about Whom the Employer is being Surveyed | LAST\_NAME, FIRST\_NAME, and PID from the participant associated with the earliest PLACEMENT START DATE from all placements associated with the Grantee/Sub-grantee and Employer that satisfy the Selection Criteria  Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID]  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID” respectively.) |

**Displayed Data Element Layout:**

**RESULTS SUMMARY:**

Total Number of Employers with Pending Employer Survey: [value]

Number of Employers where Pending Employer Survey is between 1 and 20 days from expiration: [value]

Number of Employers where Pending Employer Survey is between 21 and 60 days from expiration: [value]

Number of Employers where Pending Employer Survey is between 61 and 80 days from expiration: [value]

Number of Employers where Pending Employer Survey is between 81 and 100 days from expiration: [value]

**RESULTS DETAILS:**

**Note**: Display data elements in export file in same order shown below

[Name of Employer]

Employer ID: [value]

Employer Address: [value]

Contact: [value]

Type: [value]

Available: [value]

Date which Employer was last surveyed: [value]

Date of Placement for Pending Employer Survey: [value]

Number of Days from Placement Start Date: [value]

Last Date to Deliver Employer Survey: [value]

Participant about Whom the Employer is being surveyed: [value]

## EMPLOYER ACTIONS, DISPLAYED BY MONTH

**(Emp Actions Month)**

**Selection Criteria**

Same as EMPLOYER ACTIONS, with display organized into separate sections by month.

**Specifications for Displayed Data Elements**

|  |  |
| --- | --- |
| **Summary Elements:** | |
| Grantee/Code | GRANTEE NAME and GRANTEE CODE together |
| Sub-grantee/Code | SUB-GRANTEE NAME and SUB-GRANTEE CODE together |
| Month-Level Summary Elements: | |
| Report Month | Listing is by month, starting with month in which report is run |
| Use the details in lines 1 through 6 in the Employer Actions report’s “Displayed Data Elements”  **Note:** for each month, include in these details only those employers that have an associated Due Date within the month | |
| **ORG-Level Detail Elements:** | |
| Use the details in lines 7 through 12 in the Employer Actions report’s “Displayed Data Elements” here  **Note:** for each month, include in these details only those employers that have an associated Due Date within the month | |

## MOST IN NEED/WAIVER FACTOR ACTIONS

**(MIN/WFA)**

**Selection Criteria**

**Definitions:**

“Current Program Year” -- the PROGRAM YEAR in which the System Date falls

“Previous Program Year” -- the PROGRAM YEAR before the Current Program Year

“All” records

|  |  |
| --- | --- |
| **Specification:** | **Annotation:** |
| List of all enrollments **where** | List of all enrollments where |
| *INITIAL ASSIGNMENT DATE* is valued | The participant is has been assigned in the program |
| **AND**  EXIT DATE is null | And has not yet exited |

“Pending” records

|  |  |  |
| --- | --- | --- |
| **Specification:** | | **Annotation:** |
| List of all enrollments **where** | | List of all enrollments where |
| The “All” Selection Criteria are met | | The participant is currently active in the program |
| **AND**  at least one of the following conditions is TRUE: | | And there is at least one waiver factor for the enrollment that needs to be updated for the Current Program Year or the Previous Program Year |
| A | SEVERE DISABILITY is null  **OR** (SEVERE DISABILITY = “Y” **and** SEVERE DISABILITY DATE is null) for the Current Program Year **or** for the Previous Program Year.  When evaluating this condition, use (SEVERE DISABILITY and its DATE) entered for the Current Program Year or (SEVERE DISABILITY and its DATE) for the Previous Program Year. | |
| B | Repeat condition A but for FRAIL and its DATE | |
| C | Repeat condition A but for NOT RECEIVING SS II and its DATE | |
| D | Repeat condition A but for SEVERELY LTD EMP PROSPECTS and its DATE | |
| E | Repeat condition A but for LEP WAIVER and its DATE | |
| F | Repeat condition A but for SKILLS DEFICIENT WAIVER and its DATE | |

**Introduction:** List of all participants 1) with active enrollments in SCSEP, or 2) with active enrollments in SCSEP that have at least one missing waiver factor or waiver factor date in the current program year or the previous program year.

**Instructions:**

**Multiple Sub-Grantee Selection**

Multiple sub-grantees can be selected by holding down the Ctrl button and highlighting the desired sub-grantees. If multiple sub-grantees are selected when the report is run, the report’s outcome will include all records associated with any of the selected sub-grantees.

**Active Filters**

If the option for "Show All Current Participants" is selected, the report will include all participants with active enrollments. If the option for “Show Current Participants with Pending Waiver Factors” is selected, the report will include only current participants who have at least one waiver factor that is missing for the current program year or previous program year.

**Alpha Search Links**

Displayed beneath the sub-grantee name, there is a row of all distinct characters that appear as the first character in the “Alphabet Search” field, from all records displayed in the report results. Clicking on any character in this row will direct the web browser to go to the first record in that sub-grantee that begins with that character in the record's name.

**Program Year Filters**

If the option for “Show Both Program Years” is selected, the report will display waiver factors for both the current and previous program years. Otherwise, these filters restrict waiver factors displayed in the report to either the current or previous program year.

When there is still time to receive credit in the program year that ended on June 30 for additional waiver factors, the relevant waiver factor will display the following text: Still time for credit. Once the time period has expired, the following text will be displayed: Too late for credit.

**Alpha-numeric Search field:** PARTICIPANT LAST NAME

Filters that limit the records by which set of Selection Criteria they meet:

Display an option called “Show Current Participants With Pending Waiver Factors”. If this filter is selected when the report is run, display only enrollments that satisfy the “Pending” Selection Criteria above.

Display another option called “Show All Current Participants”. If this filter is selected when the report is run, display only enrollments that satisfy the “All” Selection Criteria above.

A - Display an option called “Show PY [YYYY] Only”. If this filter is selected when the report is run, display Waiver Factor data only for the Current Program Year. The “[YYYY]” in the option’s label is the year for the Current Program Year.

B - Display another option called “Show PY [YYYY] Only”. If this filter is selected when the report is run, display Waiver Factor data only for the Previous Program Year. The “[YYYY]” in the option’s label is the year for the Previous Program Year.

C - Display another option called “Show Both Program Years”. If this filter is selected when the report is run, display Waiver Factor data for both the Current Program Year and the Previous Program Year.

This report is automatically generated by SPARQ and cannot be regenerated by users. See the Automatic Processes Specifications for frequency.

Display the date/time the report was last generated in the following formatted text, right-aligned near the top of the report:

Last Generated: mm/dd/yyyy hh:mm:ss XM

**Specifications for Displayed Data Elements**

|  |  |  |
| --- | --- | --- |
| # | **Summary-level elements** | |
| 1 | Number of Participants | **Count** of all participants that have an enrollment that appears in the Details |
| 2 | Number of Participants 1 Year From Durational Limit | **Count** of all participants that have an enrollment where “Within 1 Year of Durational Limit” = “Yes” |
| 3 | Percent of Participants 1 year from Durational Limit | **Percent** of all participants counted in “Number of Participants” for whom there is an enrollment where “Within 1 Year of Durational Limit” = “Yes”.  If “Number of Participants 1 Year From Durational Limit” = 0, then display “N/A”.  (round this result to one decimal place) |
| 4 | Number of Participants with Waiver Factors in need of update in Current Program Year | **Count** of all participants counted in “Number of Participants” where there is an enrollment that satisfies the “Pending” selection criteria for the Current Program Year. |
| 5 | Percent of Participants with Waiver Factors in need of update in Current Program Year | **Percent** of all participants counted in “Number of Participants” for whom there is an enrollment that satisfies the “Pending” selection criteria for the Current Program Year.  If “Number of Participants with Waiver Factors in need of update in Current Program Year” = 0, then display “N/A”.  (round this result to one decimal place) |
| 6 | Number of Participants with Waiver Factors in need of update in Previous Program Year | **Count** of all participants counted in “Number of Participants” where there is an enrollment that satisfies the “Pending” selection criteria for the Previous Program Year |
| 7 | Percent of Participants with Waiver Factors in need of update in Previous Program Year | **Percent** of all participants counted in “Number of Participants” for whom there is an enrollment that satisfies the “Pending” selection criteria for the Previous Program Year.  If “Number of Participants with Waiver Factors in need of update in Previous Program Year” = 0, then display “N/A”.  (round this result to one decimal place) |
| 8 | Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year | **Count** of all participants where “Within 1 Year of Durational Limit” = “Yes” **and** there is an enrollment where any of the following dates are within the program year in which *REPORT RUN DATE* falls:  SEVERE DISABILITY DATE, FRAIL DATE,  NOT RECEIVING SS II DATE, SEVERELY LTD EMP PROSPECTS DATE,  LEP WAIVER DATE, SKILLS DEFICIENT WAIVER DATE |
| 9 | Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year | P**ercent** of all participants counted in “Number of Participants” for whom there is an enrollment counted in “Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year”.  If “Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year” = 0, display “N/A”.  (round this result to one decimal place) |
| 10 | Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year | **Count** of all participants where any of the *MONTH X DURATIONAL LIMIT DATE* values for this participant are within the program year in which the *REPORT RUN DATE* falls **AND** no durational limit extension record exists for this participant in which the DURATIONAL\_LIMIT\_DATE is within the program year in which the *REPORT\_RUN\_DATE* falls **AND** there is an enrollment where any of the following dates are within the program year in which *REPORT RUN DATE* falls:  SEVERE DISABILITY DATE, FRAIL DATE,  NOT RECEIVING SS II DATE, SEVERELY LTD EMP PROSPECTS DATE,  LEP WAIVER DATE, SKILLS DEFICIENT WAIVER DATE |
| 11 | Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year | **Percent** of all participants counted in “Number of Participants” for whom there is an enrollment counted in “Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year”.  If “Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year” = 0, display “N/A”.  (round this result to one decimal place) |
| 12 | Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year | **Count** of all participants where any of the *MONTH X DURATIONAL LIMIT DATE* values for this participant are within the program year in which the *REPORT RUN DATE* falls **AND** a durational limit extension record exists for this participant in which the DURATIONAL\_LIMIT\_DATE is within the program year in which the *REPORT\_RUN\_DATE* falls **AND** there is an enrollment where any of the following dates are within the program year in which *REPORT RUN DATE* falls:  SEVERE DISABILITY DATE, FRAIL DATE,  NOT RECEIVING SS II DATE, SEVERELY LTD EMP PROSPECTS DATE,  LEP WAIVER DATE, SKILLS DEFICIENT WAIVER DATE |
| 13 | Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year | **Percent** of all participants counted in “Number of Participants” for whom there is an enrollment counted in “Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year”.  If “Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year” = 0, display “N/A”.  (round this result to one decimal place) |
| # | **Detail-level elements** | |
| 14 | Participant (label not displayed) | Format: [LAST NAME], [FIRST NAME] PID: [PARTICIPANT ID] [HOME PHONE NUMBER] (if valued, formatted as “(###) ###-####”)  If a participant has more than one enrollment that meets the Selection Criteria, then use the HOME PHONE NUMBER from the enrollment with the latest APPLICATION DATE.  (In the export file, list these values in individual columns named “Last Name”, “First Name”, “Participant ID”, and “Home Phone Number”, respectively.) |
| 15 | Application Date | APPLICATION DATE |
| 16 | Enrollment Date | *ENROLLMENT DATE* |
| 17 | Within 1 Year of Durational Limit | If *DAYS LEFT* is between 0 and 365 (inclusive), then display “Yes”.  Else, display “No”. |
| 18 | Date Expected to Reach Durational Limit | If the participant has a break where BREAK START DATE is valued **and** BREAK END DATE is null, then display “N/A -- Currently on Approved Break”.  Else, display *REPORT RUN DATE* **plus** *DAYS LEFT*. |
| **Display the following elements toward the right side of the report.** | | |
| 19 | Date of Birth | DOB  If null, display “*Blank*” |
| 20 | County of Residence | COUNTY |
| 21 | Case Worker | CASE WORKER |
| **Display the following elements together for the Current Program Year** | | |
| 22 | PY[YYYY] WAIVER FACTORS | (heading only, display in bold)  In the label, replace "[YYYY]" with the Current Program Year. |
| 23 | Severe Disability  (in export, add “ for PY[YYYY]” to label) | For the Current Program Year:  If SEVERE DISABILITY **and** SEVERE DISABILITY DATE are both null, then display “*Blank*”.  Else, display “[SEVERE DISABILITY\*] – [SEVERE DISABILITY DATE\*]”  \* display “*Blank*” when null  In the export label, replace "[YYYY]" with the Current Program Year. |
| 24 | Frail  (in export, add “ for PY[YYYY]” to label) | Repeat the instructions for “Severe Disability” but for FRAIL and its DATE for the Current Program Year. |
| 25 | Old Enough, Not Receiving SS Title II  (in export, add “ for PY[YYYY]” to label) | Repeat the instructions for “Severe Disability” but for NOT RECEIVING SS II and its DATE for the Current Program Year. |
| 26 | Severely Ltd Emp Prospects  (in export, add “ for PY[YYYY]” to label) | Repeat the instructions for “Severe Disability” but for SEVERELY LTD EMP PROSPECTS and its DATE for the Current Program Year. |
| 27 | Limited English Proficiency  (in export, add “ for PY[YYYY]” to label) | Repeat the instructions for “Severe Disability” but for LEP WAIVER and its DATE for the Current Program Year. |
| 28 | Low Literacy Skills  (in export, add “ for PY[YYYY]” to label) | Repeat the instructions for “Severe Disability” but for SKILLS DEFICIENT WAIVER and its DATE for the Current Program Year. |
| 29 | 75 or Older (as of [RRD])  (in export, add “ for PY[YYYY]” to label) | Number of years (rounded down) between DATE OF BIRTH and *REPORT RUN DATE*.  In the label, replace "[RRD]" with the *REPORT RUN DATE*, formatted as mm/dd/yyyy. |
| **Display the following elements together for the Previous Program Year.** | | |
| 30 | PY[YYYY] WAIVER FACTORS | (heading only, display in bold)  In the label, replace "[YYYY]" with the Previous Program Year. |
| 31 | Severe Disability  (in export, add “ for PY[YYYY]” to label) | For the Previous Program Year:  If system date is between the first day of the first quarter of the current program year **and** the last day of the first quarter of the current program year,  (If SEVERE DISABILITY and SEVERE DISABILITY DATE are both null, then display “Still time for credit”  Else, If SEVERE DISABILITY is not null or SEVERE DISABILTY DATE is not null, then display “[SEVERE DISABILITY\*] – [SEVERE DISABILITY DATE\*]”  \* display “*Blank*” when null  )  Else, If SEVERE DISABILITY **and** SEVERE DISABILITY DATE are both null, then display “Too late for credit”.  Else, display “[SEVERE DISABILITY\*] – [SEVERE DISABILITY DATE\*]”  \* display “*Blank*” when null  In the export label, replace "[YYYY]" with the Previous Program Year.Repeat the instructions for “Severe Disability” ***above*** but for SEVERE DISABILITY and its DATE for the Previous Program Year. |
| 32 | Frail  (in export, add “ for PY[YYYY]” to label) | Repeat the Previous Program Year instructions for “Severe Disability” ***above*** but for FRAIL and its DATE for the Previous Program Year. |
| 33 | Old Enough, Not Receiving SS Title II  (in export, add “ for PY[YYYY]” to label) | Repeat the Previous Program Year instructions for “Severe Disability” ***above*** but for NOT RECEIVING SS II and its DATE for the Previous Program Year. |
| 34 | Severely Ltd Emp Prospects  (in export, add “ for PY[YYYY]” to label) | Repeat the Previous Program Year instructions for “Severe Disability” ***above*** but for SEVERELY LTD EMP PROSPECTS and its DATE for the Previous Program Year. |
| 35 | Limited English Proficiency  (in export, add “ for PY[YYYY]” to label) | Repeat the Previous Program Year instructions for “Severe Disability” ***above*** but for LEP WAIVER and its DATE for the Previous Program Year. |
| 36 | Low Literacy Skills  (in export, add “ for PY[YYYY]” to label) | Repeat the Previous Program Year instructions for “Severe Disability” ***above*** but for SKILLS DEFICIENT WAIVER and its DATE for the Previous Program Year. |
| 37 | 75 or Older (as of 6/30/[YY])  (in export, add “ for PY[YYYY]” to label) | Number of years (rounded down) between DATE OF BIRTH and the last day of the Previous Program Year.  In the label, replace "[YY]" with the last two digits of the Current Program Year. |

**Displayed Data Element Layout when “Show Both Program Years” is selected:**

**RESULTS SUMMARY:**

Number of Participants: [value]

Number of Participants 1 Year From Durational Limit: [value]

Percent of Participants 1 year from Durational Limit: [value]

Number of Participants with Waiver Factors in need of update in Current Program Year: [value]

Percent of Participants with Waiver Factors in need of update in Current Program Year: [value]

Number of Participants with Waiver Factors in need of update in Previous Program Year: [value]

Percent of Participants with Waiver Factors in need of update in Previous Program Year: [value]

Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year: [value]

Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year: [value]

Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year: [value]

Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year: [value]

Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year: [value]

Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year [value]

**RESULTS DETAILS:**

**Note**: Display data elements in export file in same order shown below

**[Participant]**

Application Date: [value] Date of Birth: [value]

Enrollment Date: [value] County of Residence: [value]

Within 1 Year of Durational Limit: [value]

Date Expected to Reach Durational Limit: [value]

**PY[YYYY] WAIVER FACTORS: PY[YYYY] WAIVER FACTORS:**

Severe Disability: [value] Severe Disability: [value]

Frail: [value] Frail: [value]

Old Enough, Not Receiving SS Title II: [value] Old Enough, Not Receiving SS Title II: [value]

Severely Ltd Emp Prospects: [value] Severely Ltd Emp Prospects: [value]

Limited English Proficiency: [value] Limited English Proficiency: [value]

Low Literacy Skills: [value] Low Literacy Skills: [value]

75 or Older (as of [RRD]): [value] 75 or Older (as of 6/30/[YY]): [value]

**Displayed Data Element Layout when either the Current Program Year or Previous Program Year filter is selected:**

**RESULTS SUMMARY:**

Number of Participants: [value]

Number of Participants 1 Year From Durational Limit: [value]

Percent of Participants 1 year from Durational Limit: [value]

Number of Participants with Waiver Factors in need of update in Current Program Year: [value]

Percent of Participants with Waiver Factors in need of update in Current Program Year: [value]

Number of Participants with Waiver Factors in need of update in Previous Program Year: [value]

Percent of Participants with Waiver Factors in need of update in Previous Program Year: [value]

Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year: [value]

Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year: [value]

Number of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year: [value]

Percent of Participants beyond Durational Limit Date with updated Waiver Factor in Current Program Year: [value]

Number of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year: [value]

Percent of Extended Participants with Durational Limit Date and updated Waiver Factor in Current Program Year [value]

**RESULTS DETAILS:**

**Note**: Display data elements in export file in same order shown below

**[Participant]**

Application Date: [value] Date of Birth: [value]

Enrollment Date: [value] County of Residence: [value]

Within 1 Year of Durational Limit: [value]

Date Expected to Reach Durational Limit: [value]

**PY[YYYY] WAIVER FACTORS:**

Severe Disability: [value]

Frail: [value]

Old Enough, Not Receiving SS Title II: [value]

Severely Ltd Emp Prospects: [value]

Limited English Proficiency: [value]

Low Literacy Skills: [value]

75 or Older (as of [RRD]): [value]

# Appendix A -- Archived Revision History Table

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| REVISION HISTORY | | | | | | | | | | | | |
| Revised | Sent to ZTI/CITI | | For Release | | | Changes | | | Requestors | | Authors | |
| 5/25/2006 | 5/25/2006 | |  | | | Changed for SPARQ 3:  Title  Removed Display Template sections from all reports  Revised Selection Criteria for:  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention*  *All Pending Follow-ups (all three sections)*  Revised Display Spec for  *Ineligible Applicants*  *Eligible Applicants Not Assigned Or On Waiting List*  *Waiting List*  *Active Participants*  *Exited Participants*  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention* | | |  | | C. Wilt,  M. Potts | |
| 5/29/2006 | 5/29/2006 | |  | | | Added a new dynamic Table of Contents and made changes to make the *All Pending Follow-ups* reports conform to common measures, as well as incorporation comments from COG into the reports regarding data elements to display, etc. Also fixed a few typos that appeared in the report. | | |  | | C. Wilt | |
| 6/1/2007 | 6/1/2007 | |  | | | Made some minor aesthetic improvements (deleting blank pages, etc.) and added some comments describing what is complete, and what might change pending further negotiation with COG regarding making the reports conform to the new legislation. | | |  | | C. Wilt | |
| 6/21/2007 | 6/21/2007 | |  | | | Revised Selection Criteria for  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  Revised Display Spec for  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment* to use revised timing rules  *All Pending Follow-ups* to display all follow-ups until there is a reason to believe they cannot / should not be done, and to match the new selection criteria philosophy, and to use revised timing rules in the “Expiration Date” tables  *Placements By Employer* to use new legislation data structure | | |  | | C. Wilt,  M. Potts | |
| 6/28/2007 | 6/28/2007 | |  | | | Introduction  Revised Selection Criteria for  *Exited Participants*  Revised Display Spec for  *Active Participants*  *Exited Participants* | | |  | | M. Potts, C. Wilt | |
| 7/10/2007 | 7/10/2007 | |  | | | Revised Display Spec for  *Active Participants*  *Exited Participants*  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment* | | |  | | M. Potts | |
| 7/17/2007 | 7/17/2007 | |  | | | Revised Display Spec for  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  *All Pending Follow-ups* | | |  | | M. Potts | |
| 9/4/2007 | 9/4/2007 | |  | | | Revised Selection Criteria for *All Pending Follow-ups* | | |  | | M. Potts | |
| 12/21/2007 | 12/21/2007 | |  | | | Revised Selection Criteria and Display Spec for  *Host Agencies*  *Assignments By Host Agency* | | |  | | T. Liao,  M. Potts,  S. Craig | |
| 12/27/2007 | 12/27/2007 | |  | | | Revised Display Spec for  *Host Agencies*  *Assignments By Host Agency* | | |  | | T. Liao,  M. Potts,  S. Craig | |
| 1/8/2008 | 1/8/2008 | |  | | | Revised Display Spec for  *Host Agencies*  *Assignments By Host Agency*  (see blue highlighting for changes) | | |  | | T. Liao,  M. Potts,  S. Craig | |
| 1/22/2008 | 1/22/2008 | |  | | | Added these items to the General Requirements/Instructions section, and related additions throughout the document for the appropriate reports  *“Active” filters*  *Date filters*  *Alphabet Search links*  Revised Selection Criteria and Display Spec for  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention*  *Unsubsidized Employers*  *Placements By Employer*  Revised Display Spec for  *Exited Participants* | | |  | | T. Liao,  M. Potts,  S. Craig | |
| 2/25/2008 | 2/25/2008 | |  | | | Added one new item and moved one existing item to the General Requirements/Instructions section  Added Participant ID and/or “PID” label to reports 1 - 11, 13, and 15  Revised Selection Criteria for  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention*  *All Pending Follow-ups*  Revised Display Spec for  *Exited Participants*  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention*  *Unsubsidized Employers*  *Placements By Employer*  Added a display note to these reports to allow only sub-grantee reports to be run  *Host Agencies*  *Assignments By Host Agency*  *Unsubsidized Employers*  *Placements By Employer* | | |  | | M. Potts, C. Wilt, T. Liao | |
| 4/9/2008 | 4/9/2008 | |  | | | Moved General Requirements/Instructions to be below Table of Contents, and added sub-section headers in General Requirements/Instructions  Updated to match report functionality:  Alpha-numeric Search links  Display Spec for *Active* and *Exited* reports  Revised Selection Criteria and Display Spec for  *Participants Who Have Started Employment But Not Yet Achieved Entered Employment*  *Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention*  Switched order of these reports:  *All Pending Follow-Ups Displayed By Month*  *Pending Follow-Ups Beyond Due Date* | | |  | | M. Potts | |
| 2/11/2009 | 2/11/2009 | |  | | | Moved out the Constructed Variables to the Import File and Edits Specifications  Added “Stimulus” filters under Report Enhancements  Revised Display Spec for  *Ineligible Applicants*  *Eligible Applicants Not Assigned Or On Waiting List*  *Waiting List*  *Active Participants*  *Exited Participants* | | |  | | T. Liao,  M. Potts | |
| 2/18/2009 | 2/18/2009 | |  | | | Revised names of Recovery Act (stimulus) fields and filters | | |  | | M. Potts | |
| 2/25/2009 | 2/25/2009 | |  | | | Removed need to add Recovery Act filters | | |  | | M. Potts | |
| 5/28/2009 | 5/28/2009 | |  | | | Added report 16, *Average Project Duration*  Re-organized/clarified existing Specifications for Displayed Data Elements for *Active Participants* and *Exited Participants* reports  Added “Average Days on Leave of Absence” to *Active Participants* report  Added counts and averages of months in “(Average) Time in Program Since 7/1/2007” and “(Average) Time in [Grantee/Sub-Grantee] Since 7/1/2007” in *Active Participants* and *Exited Participants* reports  Revised *Active Participants* and *Exited Participants* reports to show duration-related counts and averages instead of \* | | |  | | M. Potts | |
| 7/9/2010 | 7/9/2010 | |  | | | For 4.4:  Changes in report list:  Combined Active and Exited reports into the [Current/Exited](#A_E) report (moved elements are shaded in light yellow)  Deleted Follow-Ups Beyond Due Date report  Removed need to add Average Project Duration management report  Added [WDL](#WDL) report | | |  | | M. Potts | |
| 7/9/2010  (cont’d) | 7/9/2010 | |  | | | Additions:  Note about shortened names in [General Requirements/Instructions](#_General_Requirements/Instructions)  Note about address fields in export files in [General Requirements/Instructions](#_General_Requirements/Instructions)  Mention that the [Current/Exited](#A_E) report has two sets of date filters in [Report Enhancements](#Enhance)  [WDL](#WDL) report to list of reports that get Alpha-numeric Search links in [Report Enhancements](#Enhance)  Report Blurbs section in [Report Enhancements](#Enhance), and the Blurb for each report  Report Instructions section in [Report Enhancements](#Enhance), and the Instructions for each report  Case Worker and County of Residence elements to these reports: [Pending](#Pend), [Ineligible](#Inel), [Eligible](#Elig), [Waiting List](#WL), [Current/Exited](#A_E), [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp), [Pending FU](#PendFU), [Pending FU by Quarter](#PendFU_Month)  County of Authorized Position element to these reports: [Current/Exited](#A_E), [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp), [Pending FU](#PendFU), [Pending FU by Quarter](#PendFU_Month)  “Current” and “Exited” record filters to the [Current/Exited](#A_E) report  Collapsed Results Details option to the [Current/Exited](#A_E) report  These elements to the [Current/Exited](#A_E) report:  Average Days Ever on Leave of Absence Assignment Start Date  Average Number of Assignments per Enrollment Average Time in SCSEP  Average Number of Enrollments per Participant Enrollment Date  Average Number of Leaves per Enrollment Exclusion Discovered After Exit  Date Exclusion After Exit Was Discovered Percent Excluded after Exit  Number of Participants Ever on Leave of Absence Three Job Interest Codes  Number of Participants with More Than One Enrollment Time in SCSEP  Numerators and denominators in Preliminary Entered Employment Rates in [Started Employment](#Start_Emp) report (re-highlighted yellow existing changes)  Numerators and denominators in Preliminary Retention Rates in [Entered Employment](#Enter_Emp) report (re-highlighted yellow existing changes) | | |  | | M. Potts | |
| 7/9/2010  (cont’d) | 7/9/2010 | |  | | | Revisions:  Renamed [Pending FU by Quarter](#PendFU_Month) report  Removed last 4 of SSN from these reports: [Pending](#Pend), [Ineligible](#Inel), [Eligible](#Elig), [Waiting List](#WL), [Current/Exited](#A_E), [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp), [Pending FU](#PendFU), [Pending FU by Quarter](#PendFU_Month)  Moved address and phone data to be in Participant element in [Pending](#Pend) report  Cleaned up specs and names for re-activated duration counters in [Current/Exited](#A_E) report  Inserted hard-return in format of Participant element in [Current/Exited](#A_E) report  Organized the Displayed Data Element Layout for the [Current/Exited](#A_E) report  How counts of Date Sequence Error records are displayed in [Current/Exited](#A_E) report  Renamed “Days on Leave of Absence” element in [Current/Exited](#A_E) report  Renamed these elements in [Started Employment](#Start_Emp) report: “Number of Participants”, “Date Eligible…”, and “Days Remaining…”  Renamed these elements in [Entered Employment](#Enter_Emp) report: “Number of Participants”, “Date Eligible…”, and “Days Remaining…”  For 4.X:  Added:  Report element filters to the [Current/Exited](#A_E) report  Detail filters to the [Current/Exited](#A_E) report  Case Worker and County of Residence elements to these reports: [Assignments by HA](#CSAs_HA), [Placements by ER](#UEs_Emp)  County of Authorized Position element to these reports: [Assignments by HA](#CSAs_HA), [Placements by ER](#UEs_Emp)  Contacts element to [Host Agencies](#HAs) report  HA FEIN element to [Assignments by HA](#CSAs_HA) report  Employer FEIN element to [Placements by ER](#UEs_Emp) report  Placement Start Date element to [Placements by ER](#UEs_Emp) report  Revisions:  Removed last 4 of SSN from these reports: [Assignments by HA](#CSAs_HA), [Placements by ER](#UEs_Emp)  Note: These changes for 4.X do not include *all* changes that need to be made for 4.X. | | |  | | M. Potts | |
| 7/27/2010 | 7/27/2010 | |  | | | Re-organized three participant detail-level “Time…” elements to use A,B convention for display specification in the [Current/Exited](#A_E) report  Updated “Number of Participants Approaching Durational Limit” element in [WDL](#WDL) report | | |  | | M. Potts | |
| 8/31/2010 | 8/31/2010 | |  | | | Highlighted blue most changes that do not apply to the new [WDL](#WDL) report  Added text for displaying “No Results Found” in [General Requirements/Instructions](#_General_Requirements/Instructions)  Moved/generalized a restriction on large grantees not running grantee-level reports in [General Requirements/Instructions](#_General_Requirements/Instructions)  Added a new section, [Report Export Files](#ReportExportFiles), in the General Requirements/Instructions section  Added text concerning which data should appear in export files in [Report Export Files](#ReportExportFiles)  Added text about [header titles](#ReportExportFiles) in the exports matching closely to the header tiles in the html version of the reports  Added text about [headers not having leading or trailing specs](#ReportExportFiles), and are located on the [first row of the .csv file](#ReportExportFiles)  Added text about the [formatting of the export file contents](#ReportExportFiles)  Excluded zeros from the “Average Days Ever on Leave of Absence” calculation in the [Current/Exited](#A_E) report  Switched order of first two summary elements in [WDL](#WDL) report  Revised names of all Types and all summary elements in [WDL](#WDL) report  Added Type as a detail element for export file only in [WDL](#WDL) report  Added text about which participant data to display when the participant has [multiple enrollments with null Exit Dates](#MultEnrWOExitsInWDLReport)  Added Application Date as detail element in [WDL](#WDL) report  Added note about names of Participant detail element fields in export file for [WDL](#WDL) report  Revised instructions for [Date Expected to Reach Durational Limit](#DateExpected) to show nothing for null *DAYS LEFT*  Updated names of third and fourth Waiver Factors in [WDL](#WDL) report  Modified [75 or Older](#OrOlder) instructions: removed “([that number of years])” | | |  | | M. Potts, T. Cram, S. Craig | |
| 9/1/2010  (draft) | 9/1/2010 | |  | | | Added action reports and placeholders for new reports (subsequent spec versions will have more detailed comments in this table) | | |  | | M. Potts | |
| 9/2/2010 | 9/2/2010 | |  | | | Updated Display Instructions in [WDL](#WDL) report (see green highlighted text) (for 4.4) | | |  | | M. Potts | |
| 9/7/2010 | 9/7/2010 | |  | | | For [WDL](#WDL) report (for 4.4):  - Highlighted blue text dealing with selecting records at sub-grantee level  - Added message to be displayed at top of report (see green highlighted text)  - Removed note about which records with null *ENROLLMENT DATES* can appear (see green highlighted text) | | |  | | M. Potts | |
| 9/10/2010  (draft) | 9/10/2010  (sent as split 4.4.1 and 4.5 files) | |  | | | Inserted other changes made in [WDL](#WDL) report for 4.4 (see gray highlighted text):  - Added “Last Generated” date/time  - Show report run date for “Date Expected to Reach Durational Limit” for Duration Date Errors  For 4.4.1:  For [WDL](#WDL) report:  - Reverted all blue highlighted text to yellow highlighted text  - Revised name of “Participants Approaching Durational Limit”  - Added “Affected grantees” value to “Participant” info  - Added instruction to calculate certain edits when the report is run  - Added instruction to display a message when the report is run  For 4.5:  Reverted all blue highlighted text to yellow highlighted text  Removed placeholders for redundant/unnecessary reports  Inserted specs for [Entered Employment II](#Enter_Emp_II) report  Inserted specs for [Break](#Break) report  Revised “Number of Current Participants” to show N/A instead of 0 in [Current/Exited](#A_E) report  Revised name of “Number of Participants with More Than One Enrollment” in [Current/Exited](#A_E) report  Revised “Number of Participants Ever on Leave of Absence” and “Average Number of Leaves of Absence Per Enrollment” in [Current/Exited](#A_E) report  Revised handling of open Prior Assignments in “Days in Assignment” in [Current/Exited](#A_E) report  Added line for *RE-ENROLLED 90 OTHER RECORD* in Preliminary Entered Employment Rates in [Started Employment](#Start_Emp) report  Added line for *RE-ENROLLED 90 OTHER RECORD* in Preliminary Retention Rates in [Entered Employment](#Enter_Emp)report  Added Program Year Filter to [Pending FU by Quarter](#PendFU_Month) report | | |  | | M. Potts | |
| 9/16/2010  (draft) | 9/16/2010  (sent as split 4.4.1 and 4.5 files) | |  | | | **For 4.5:**  Added “Days on Most Recent Leave of Absence” and “Assignment End Date” elements to [Current/Exited](#A_E) report  Distributed “value < 0” instructions and incorporated Exit Date for “Days in Assignment” in [Current/Exited](#A_E) report  Added conditions to handle re-enrolled participants in “Entered Employment Achieved” element in [Current/Exited](#A_E) report  Added phone number, email address, and export file column names to “Contacts” element in [Current/Exited](#A_E) report  Revised name of “Start current employ” element in [Started Employment](#Start_Emp) report  Revised name of “Start Current Employ” element in [Entered Employment](#Enter_Emp)report  Added second set of Selection Criteria and filters for them in [Break](#Break) report  Added sort order in [Break](#Break) report  Added, revised, and re-ordered displayed data elements in [Break](#Break) report  Added Displayed Data Element Layout in [Break](#Break) report  Added filters for displaying contacts on [Host Agencies](#HAs) report  Revised Selection Criteria for [Emp Actions](#Emp_Actions) report  Revised “Active” and “Date of Last CS Survey” elements in [Emp Actions](#Emp_Actions) report  Removed “Due Date of Next CS Survey” element from [Emp Actions](#Emp_Actions) report  Renamed [MIN/WFA](#MIN_WDL) report  Revised Selection Criteria and most displayed (summary and detail) elements in [MIN/WFA](#MIN_WDL) report | | |  | | M. Potts | |
| 10/1/2010 | 10/1/2010 | |  | | | **For 4.4.2:**  Removed the “Your report is being generated.” message from the [WDL](#WDL) report.  For 4.X:  Highlighted necessary text inblue | | |  | | M. Potts,  S. Craig | |
| 10/7/2010 | 10/7/2010 | |  | | | Inserted other changes made in [WDL](#WDL) report for 4.4.1 (see gray highlighted text):  - Added instruction for generating new results only once a day  - Added note about four grantees not able to recalculate the report manually  **For 4.5:**  Removed all duration data error exclusions and exceptions from elements in [Current/Exited](#A_E) report  Revised (simplified) “Days in Assignment” in [Current/Exited](#A_E) report  Deleted part B of the selection criteria in the [WDL](#WDL) report  Deleted the Duration Date Error grouping in the [WDL](#WDL) report  Moved the “Affected Grantees” to a separate line and renamed its label in the [WDL](#WDL) report  Updated the Name, Blurb, and Instructions for the [Break](#Break) report  Corrected label name in Displayed Data Element Layout in [Break](#Break) report  Added/revised Blurb and Instructions for [MIN/WFA](#MIN_WDL) report | | |  | | M. Potts,  S. Craig,  L. Vittoriano | |
| 10/15/2010 | 10/15/2010 | |  | | | Turned to blue specs for Collapsed Results Details option, Element Filters, and Detail Filters in [Current/Exited](#A_E) report  Turned to blue all changes for [Started Employment](#Start_Emp), [Entered Employment](#Enter_Emp), and [Pending FU by Quarter](#PendFU_Month) reports  Added [Break](#Break) report to list of reports in Intro that gets Date Filters (was missing from list)  Clarified language in the “Pending” part of the selection criteria in the [MIN/WFA](#MIN_WDL) report | | | ZTI/CITI | | M. Potts | |
|  | | | Added export file header names for “Participant” element in [Current/Exited](#A_E) report  Removed instruction to display error message for “Days in Enrollment” in [Current/Exited](#A_E) report  Added export file header names for “Address” element in [Current/Exited](#A_E) report  Changed export file header names for “Contact” element in [Current/Exited](#A_E) report  Undeleted export file header names for “Participant” element in [WDL](#WDL) report  Added [Break](#Break) report to list of reports in Intro that gets Alpha-numeric Search links (was missing from list) | | | MPR | |
| 10/28/2010 | 10/28/2010 | |  | | | Removed OBE reference to null *DAYS LEFT* in “Within 1 Year of Durational Limit” and “Date Expected to Reach Durational Limit” elements in the [MIN/WFA](#MIN_WDL) report | | | ZTI/CITI | | M. Potts | |
|  | | | Finished Instruction text for [Current/Exited](#A_E) report | | | MPR | |
| 11/2/2010 | 11/2/2010 | |  | | | In the [WDL](#WDL) report:  - Removed OBE reference to calculating edits A13-8 and A15a-12 before generating the report  - Removed references to grantees regenerating the report daily or manually  - Removed unnecessary reference to “part A” of selection criteria | | | MPR | | S. Craig | |
|  | | | In the [Current/Exited](#A_E) and [WDL](#WDL) reports:  - Added reference to Automatic Processes Specifications for frequency of regeneration | | | ZTI/CITI | |
| 11/11/2010 | 11/11/2010 | |  | | | Added [Current/Exited](#A_E) and [WDL](#WDL) reports as exceptions to [running only sub-level report](#_General_Requirements/Instructions)s for “big three” grantees  Modified name of “Average Days in Current Assignment” element in [Current/Exited](#A_E) report  Added equals sign in instruction for “Days on Approved Break” in [Break](#Break) report  Added reference to Automatic Processes Specifications for frequency of generation of [MIN/WFA](#MIN_WDL) report  Added Last Generated Date and Time to [Current/Exited](#_5._ACTIVECURRENT/EXITED_PARTICIPANT) and [MIN/WFA](#MIN_WDL) reports | | | ZTI/CITI | | M. Potts,  L. Vittoriano, S. Craig | |
|  | | | Modified name of “Average Days in Current Enrollment” element in [Current/Exited](#A_E) report  Updated and added label corrects in Displayed Data Element Layout in [Current/Exited](#A_E) report  Modified name and added instruction for “Average Number of Assignments per Enrollment” in [Current/Exited](#A_E) report | | | MPR | |
| 11/29/2010 | 11/29/2010 | |  | | | Revised Instructions text and Filter Date field labels in [Break](#Break) report | | | MPR | | S. Craig | |
| 2/7/11 | | 2/7/11 |  | | Moved old rows in this table to new [Archived Revision History Table](#_Appendix_A_--) appendix | | | | MPR | | S. Craig,  M. Reilly,  M. Potts | |
| Added “a” in the [MIN/WFA](#MIN_WDL) instructions (highlighted in blue)  Updated Blurb in [Current/Exited](#_5._CURRENT/EXITED_PARTICIPANTS) report (highlighted in blue) | | | | BCT | |
| Removed references to SSN from these reports:  - Applicants: [Pending](#_PENDING_APPLICANTS), [Ineligible](#_INELIGIBLE_APPLICANTS), [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Waiting List](#_WAITING_LIST)  - Participants: [Started Employment](#_PARTICIPANTS_WHO_HAVE), [Entered Employment](#Enter_Emp)  - Follow-ups: [Pending FU](#_ALL_PENDING_FOLLOW-UPS), [Pending FU by Month](#_121._ALL_PENDING)  - Host Agencies: [Assignments by HA](#_ASSIGNMENTS_BY_HOST)  - Employers: [Placements by ER](#_PLACEMENTS_BY_EMPLOYER)  Updated [MIN/WFA](#_MOST_IN_NEED/WAIVER) report’s “Pending” group to handle waiver factor data entered for any given program year  Updated Waiver Factors in [WDL](#_WAIVER_OF_DURATIONAL) (and [MIN/WFA](#_MOST_IN_NEED/WAIVER)) report to handle waiver factor data entered for multiple program years  Updated [WDL](#_9._WAIVER_OF) report to show people with 0 days left (highlighted in blue)  Updated element in [MIN/WFA](#MIN_WDL) report to handle 0 days left (highlighted in blue) | | | | DOL | |
| 3/4/11 | | 3/4/11 |  | | Changed “program year” to upper case in display of waiver factors in the [WDL](#_WAIVER_OF_DURATIONAL) report (display element 26), to indicate that the PROGRAM YEAR field in the waiver factor record needs to be referenced in those places (change also applies to the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report)  Changed “program year” to upper case in the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report (“Pending” records selection criteria, line A) for the same reason | | | | MPR | | M. Potts | |
| 4/13/11 | | 4/13/11 |  | | Clarified language in what to display for Waiver Factor elements in [WDL](#_WAIVER_OF_DURATIONAL) report | | | | ZTI/CITI | | S. Craig,  M. Potts | |
| 5/19/11 | | 5/20/11 as Special Preview |  | | Added “Participants Who Reached Durational Limit” ([Reached DL](#_PARTICIPANTS_WHO_REACHED)) report, and added its shortened name to the list of [Report Enhancements](#_Report_Enhancements) where applicable  Highlighted yellow the “0” changes in the [WDL](#_WAIVER_OF_DURATIONAL) report  Added DOB to WDL report detail  Highlighted yellow the “0” changes in the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report  Revised “Pending” Selection Criteria in the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report  Revised waiver factor display fields in the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report to not show the current program year’s data | | | | DOL | | M. Potts,  S. Bond | |
| 6/3/11 | | 6/3/11 |  | | Updated the “All” Selection Criteria in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report  Highlighted the “Currently Active” and “Exited” Selection Criteria in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report in blue for future release  Highlighted the filters in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report in blue for future release  Highlighted selection and display criteria in the [MIN/WFA](#_MOST_IN_NEED/WAIVER) report in blue for future release | | | | ZTI/CITI | | S. Craig,  M. Potts | |
| Added instructions for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report’s export file regarding the Extension and Durational Limit Date display data | | | | MPR | |
| 6/8/11 | | 6/8/11 |  | | Moved “Ethnicity” to below “White” in the list of races in both the Summary and Display sections of the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report, and updated its Displayed Data Element Layout accordingly | | | | ZTI/CITI | | S. Craig | |
| 6/28/11 | | 6/28/11 |  | | Changed title of Waiver Factors display section in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report  Corrected title of [Reached DL](#_PARTICIPANTS_WHO_REACHED) report  Updated display of waiver factors in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report  Added note about displaying report names in [General Instructions](#_General_Requirements/Instructions) | | | | MPR | | M. Potts | |
| Specified in the “Extension data” display element in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report that all extensions for the person should be displayed  Updated the Display Instructions in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | ZTI/CITI | |
| 8/1/11 | | 8/1/11 |  | | Changed the selection criteria of the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report to include people who have *DAYS LEFT ORIGINAL =* 0.  Replaced “Original” with “48-month” in labels in [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | COG | | S. Bond  M. Potts | |
| 8/11/11 | | 8/11/11 |  | | Changed the display criteria for the Days Beyond Durational Limit field on the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report. | | | | BCT/MPR | | S. Craig | |
| 8/23/11 | | 8/23/11 |  | | Changed the selection criteria of the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report to include people whose Exit Date = *DURATIONAL LIMIT DATE ORIGINAL* | | | | COG | | S. Craig | |
| 10/4/11 | | 10/4/11 | 5.3 | | Added Exit Date to [Break](#Break) report  Revised selection criteria of the [WDL](#WDL) report to remove participants who are not assigned  For the [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) report:  - Updated “Pending” selection criteria, and highlighted yellow existing changes to it  - Updated Blurb  - Updated Instructions text  - Modified how waiver factors get displayed  - Added Date of Birth  - Updated report layout example | | | | COG | | M. Potts  A. Millar  S. Craig | |
| 12/7/11 | | 12/7/11 | 5.2.1 | | Added text describing the [Waiting Indicator](#WaitingIND) under General Requirements/Instructions  Highlighted changes to the [Break](#Break), [WDL](#WDL), and [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) reports in blue for future release | | | | ZTI/CITI | | S. Bond,  S. Craig | |
| 1/20/12 | | 1/20/12 |  | | Added selection criteria to filter re-enrollments from [Pending FU](#_ALL_PENDING_FOLLOW-UPS) and [Pending FU by Month](#_121._ALL_PENDING) reports  Highlighted most of the changes to the [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) report in yellow for the 5.4 release  Updated Blurb in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | COG | | S. Bond | |
| 2/29/12 | | 2/29/12 |  | | Removed percentages from the Summary section in the [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) report | | | | BCT/MPR | | S. Bond | |
| 3/12/12 | | 3/12/12 |  | | Added instruction to the [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) report to display “Blank” when Date of Birth is null | | | | ZTI/CITI | | S. Craig | |
| Highlighted changes to the [Pending FU](#_ALL_PENDING_FOLLOW-UPS) and [Pending FU by Month](#_121._ALL_PENDING) reports in blue for future release | | | | BCT/MPR | |
| 6/19/12 | | 6/19/12 DRAFT | 6.0 | | For the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report:  - Revised Summary results to be displayed in a grid formation  - Added headers for Summary grid  - Added specs for individual columns of results for Summary grid  - Added "Status at Durational Limit" Detail element  - Updated the “Displayed Data Element Layout” accordingly  Added percentage Summary measures to the [MIN/WFA](#_MOST_IN_NEED/WAIVER_1) report, updated the “Displayed Data Element Layout” accordingly, and highlighted the changes blue | | | | COG | | S. Bond,  M. Potts | |
| 6/25/12 | | 6/25/12 | 6.0 | | For the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report:  - Renumbered spec rows  - Renamed "Status of Durational Limit" field  - Added name of headers in Durational limit dates instructions  - Clarified "Months of Duration" value for the "Durational Limit Date (Current)"  - Updated Durational Limit Date values and headers in the export | | | | BCT/MPR | | S. Craig | |
| 8/24/12 | | 8/24/12 | 6.0 | | For the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report:  - Swapped position of Durational Limit Date columns and Extension columns in export file  - Updated names of Extension columns in export file  - Specified that Extension columns in export file list extension requests beyond the first, but to not include column headers for them  - Added "possible" to the specs in the element handling Durational Limit Dates in the export file | | | | ZTI/CITI | | M. Potts | |
| For the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report:  - Added "48-month" to these labels:  - Number Reached Durational Limit  - 75 or Older When Durational Limit Was Reached  - Beyond durational limit  - Status of Durational Limit  - Age When Durational Limit Was Reached  - 75 or Older When Durational Limit Was Reached  - Added "Current" to label “Days Beyond Durational Limit”  - Updated labels in specs accordingly for Summary elements  - Updated labels accordingly in the Displayed Data Element Layout | | | | BCT/MPR | |
| 9/27/2012 | |  | 6.1 | | Highlighted in yellow the following changes.  - Date filters and active filters for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | BCT/MPR | | S. Bond | |
| 10/17/2012 | |  | 6.1 | | Highlighted in blue the following changes.  - Date filters and active filters for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | COG | | S. Bond | |
| 10/24/2012 | | 10/25/2012 | 6.1 | | Highlighted in yellow the following changes.  - Active filters for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report  - Exited filters for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report | | | | BCT/MPR/COG  /ZTI/CITI | | S. Bond | |
| 1/29/2013 | |  | 6.2 | | Added “Grantee Code – Grantee Acronym” to export files  Highlighted in yellow the County of Residence field for the following reports:  - Pending Applicants  - Eligible Applicants  - Waiting List  - Started Employment  - Entered Employment  - Pending FUYs  - Assignments by HAs  Added blurb and instructions to the Started Employment and Pending FUs reports  Highlighted in yellow the following changes to the Started Employment report:  - County of Authorized Position  - Case Worker  - Reason for Lack of Entered Employment Credit  - Miscellaneous label changes  - Detection of re-enrollments to selection criteria  Highlighted in yellow the following changes to the RDL report:  - Date filters on the report  - Date filters text in the instructions  Highlighted in yellow the detection of re-enrollments in the Pending FUs report  Highlighted in yellow the Participant Actions and Participant Actions by Month reports | | | |  | | T. Calise, S. Craig | |
| 1/30/2013 | |  | 6.2 | | Added [Volunteerism Follow-up](#_VOLUNTEERISM_FOLLOW-UPS) management report | | | |  | | T. Calise | |
| 2/5/2013 | |  | 6.2 | | Revised Selection criteria of [Started Employment but not Achieved Entered Employment](#Start_Emp) Report to detect re-enrollments  Removed County of Authorized Position from details of the [Started Employment but not Achieved Entered Employment](#Start_Emp) Report  Revised details criteria in the [Participant Actions](#_PARTICIPANT_ACTIONS) Report  Added elements to summary of the [WDL](#WDL) Report | | | |  | | S. Bond | |
| 2/11/2013 | |  | 6.2 | | Revised selection criteria for the [Reached DL](#_PARTICIPANTS_WHO_REACHED) report to remove transferred records | | | |  | | S. Bond | |
| 2/12/2013 | |  | 6.2 | | Revised selection criteria, instructions, and detail elements for the [Volunteerism Follow-up](#_VOLUNTEERISM_FOLLOW-UPS) Report | | | |  | | S. Bond | |
| 2/13/2013 | |  | Future | | Removed County of Authorized Position from all reports | | | |  | | S. Craig | |
| 2/14/2013 | | 2/15/2013 | 6.2 | | Reviewed Specs  Added conditions 2, 3, and 5 in selection criteria  Removed old conditions from selection criteria based on FU VOL SCHEDULED DATE  Added DISPLAY RULE FOR SCHEDULED DATE  Updated blurb text to not mention volunteerism instead of employers  Highlighted these Displayed Data Elements blue for a future release:  Number of Completed Volunteerism Follow-ups  Percentage Of Completed Volunteerism Follow-ups  Volunteerism Follow-up Completed Date  Is this activity conducted in a SCSEP host agency?  Type of Volunteer Organization  Added these Displayed Data Elements  Application Date  Did participant engage in volunteer work during enrollment?  Will participant engage in volunteer work after participation?  Deleted Displayed Data Elements that dealt with employer or contact data  Updated the Displayed Data Element Layout to match the list of updated elements | | | | MPR | | M. Potts | |
| 2/15/2013 | |  | 6.2 | | Reviewed changes to Volunteerism Follow-up report | | | |  | | S. Craig | |
| 3/22/2013 | |  | 6.2 | | Removed grace period from Summary table specifications of [Participant Actions](#_PARTICIPANT_ACTIONS) Report  Revised logic in Summary table specifications of [Participant Actions](#_PARTICIPANT_ACTIONS) Report | | | | MPR | | S. Bond | |
| 3/22/2013 | |  | Future | | Highlighted in blue Participant Actions Monthly Report for future release  Highlighted in blue the insertion of County of Residence in the following Reports for future release  - Pending Applications  - Eligible Applicants  - Waiting List  - Achieved Entered Employment but not Retention  - Assignment by Host Agency | | | | MPR/BCT/COG | | S. Bond | |
| 4/4/2013 | | 4/4/2013 |  | | Reviewed changes | | | |  | | S. Craig | |
| 4/18/2013 | | 4/23/2013 | 6.2 | | Added blurb and instructions to [Participant Actions](#_PARTICIPANT_ACTIONS) Report | | | | ZTI/CITI | | S. Craig | |
| 4/23/2013 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 4/23/2013 | | 4/23/2013 | 6.2 | | Revised logic in the summary table of the [Participant Actions](#_PARTICIPANT_ACTIONS) Report  Revised general requirements to include concatenation of grantee code and grantee acronym on all exports | | | | ZTI/CITI | | S. Bond | |
| 4/23/2013 | |  |  | | Reviewed changes | | | |  | | S. Craig | |
| 4/24/2013 | |  | 6.2 | | Added instructions for checkboxes to [Participant Actions](#_PARTICIPANT_ACTIONS) Report | | | | ZTI/CITI | | S. Bond | |
| 4/25/2013 | |  | 6.2 | | Revised instructions for checkboxes in [Participant Actions](#_PARTICIPANT_ACTIONS) Report | | | | MPR | | S. Bond | |
| 5/10/2013 | |  | 6.2 | | Revised specifications in the details table of the [Participant Actions](#_PARTICIPANT_ACTIONS) Report to account for enrollments with no open assignments  Revised logic in the summary table of the [Participant Actions](#_PARTICIPANT_ACTIONS) Report to treat enrollments whose action is on the report run date as pending actions. | | | | BCT/MPR | | S. Bond | |
| 5/13/2013 | | 5/14/2013 | 6.2 | | Reviewed changes | | | |  | | S. Craig | |
| 5/21/2013 | | 5/22/2013 | 6.2 | | Added red note to the top of the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report  Corrected typo in “Participant 1 Quarters” label on [WDL](#WDL) Report  Highlighted blue the Date Filter information in the Instructions and Date Filter logic in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report  Changed the date filter labels in the Instructions for the [Started Employment](#Start_Emp) Report  Added date filter label instructions to the [Started Employment](#Start_Emp) Report | | | | BCT/MPR | | S. Craig | |
| 5/21/2013 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 5/23/2013 | |  | 6.3 | | Created 6.3 specifications from 6.2 version.  Accepted yellow track changes and kept blue. | | | |  | | M. Kerachsky | |
| 6/4/2013 | | 6/4/2013 | 6.2 | | Changed Number of Participants count in the [Participant Actions](#_PARTICIPANT_ACTIONS) Report to Number of Enrollments | | | | BCT/MPR | | S. Craig | |
| 6/4/2013 | |  | 6.2 | | Reviewed changes | | | |  | | S. Bond | |
| 7/25/2013 | |  | 6.4 | | Revised date filters in the [Reached Durational Limit Report](#_PARTICIPANTS_WHO_REACHED) to consider durational limit dates beyond the 48 month date  Added a note regarding outstanding rejects to [Current/Exited Report](#_CURRENT/EXITED_PARTICIPANTS)  Added a note regarding the order of the columns in the details export file of the [MIN/WFA Report](#_MOST_IN_NEED/WAIVER_1) | | | | BCT/MPR | | T. Calise | |
| 7/25/2013 | |  | Future | | Added text to the instructions for the [WDL](#WDL).  Deleted text from the instructions for the [WDL](#WDL). | | | | MPR | | S. Bond | |
| 7/26/2013 | |  | 6.4 | | Changed labels in [WDL](#WDL) summary from 1 Year to 365 days | | | | BCT/MPR | | B. Hartigan | |
| 7/29/2013 | |  | 6.3 | | Highlighted the following report instructions yellow:  [Waiting List](#WL), [Placements by Employer](#UEs_Emp), [Pending Applicants](#Pend), [Pending Followups,](#_ALL_PENDING_FOLLOW-UPS) [Ineligible](#_INELIGIBLE_APPLICANTS), [Host Agencies](#_HOST_AGENCIES), [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST)  Highlighted the following report blurbs yellow:  [Waiting List](#WL), [Placements by Employer](#UEs_Emp), [Pending Applicants](#Pend), [Ineligible](#_INELIGIBLE_APPLICANTS), [Host Agencies](#_HOST_AGENCIES), [Eligible](#_ELIGIBLE_APPLICANTS_NOT),  [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST)  Highlighted the removal of filter instructions from [WDL](#WDL) yellow  Highlighted the removal of durational limit discussion from [WDL](#WDL) yellow  Highlighted label changes in [Break](#Break) Report summary yellow.  Highlighted label changes in the [Placements by Employer](#UEs_Emp) Organization Summary yellow. | | | | BCT/MPR | | S. Bond | |
| 7/30/2013 | |  |  | | Reviewed changes | | | |  | | S. Craig | |
| 8/5/2013 | |  | 6.3 | | Highlighted the instructions and blurb for the [Employers](#_UNSUBSIDIZED_EMPLOYERS) report yellow.  Highlighted the blurb for the [Pending FU by Month](#_ALL_PENDING_FOLLOW-UPS_1) report yellow.  Highlighted label change from “1 year” to “365 days” in [WDL](#WDL) yellw. | | | | BCT/MPR | | S. Bond | |
| 8/5/2013 | |  | 6.3 | | Reviewed changes | | | |  | | S. Craig | |
| 8/6/2013 | |  | 6.3 | | Highlighted name change for the [Pending FU by Month](#_ALL_PENDING_FOLLOW-UPS_1) report yellow.  Revised blurb in the [Pending FU by Month](#_ALL_PENDING_FOLLOW-UPS_1) report | | | | MPR/BCT | | S. Bond | |
| 8/6/2013 | | 8/6/2013 | 6.3 | | Reviewed changes | | | |  | | S. Craig | |
| 8/8/2013 | |  | 6.3 | | Revised introduction text for the following reports:  [Pending](#Pend)  [Ineligible](#_INELIGIBLE_APPLICANTS)  [Eligible](#_ELIGIBLE_APPLICANTS_NOT)  [Waiting List](#WL) | | | | MPR/BCT | | S. Bond | |
| 8/9/2013 | |  | 6.3 | | Revised introduction text for the following reports:  [Pending](#Pend)  [Ineligible](#_INELIGIBLE_APPLICANTS)  [Waiting List](#WL) | | | | MPR | | S. Bond | |
| 8/13/2013 | |  | 6.3 | | Added phrase “with this grantee or sub grantee” to the introduction text for the following reports:  [Pending](#Pend)  [Ineligible](#_INELIGIBLE_APPLICANTS)  [Eligible](#_ELIGIBLE_APPLICANTS_NOT)  [Waiting List](#WL) | | | | BCT/COG | | S. Bond | |
| 8/14/2013 | |  | Future | | Highlighted the following items blue for future release:   * Introduction of [Pending](#Pend) report * Instructions for [Pending](#Pend) report * Introduction of [Ineligible](#_INELIGIBLE_APPLICANTS) report * Instructions for [Ineligible](#_INELIGIBLE_APPLICANTS) report   - Introduction of [Eligible](#_ELIGIBLE_APPLICANTS_NOT) report  - Instructions for [Eligible](#_ELIGIBLE_APPLICANTS_NOT) report   * Introduction of [Waiting List](#WL) report * Instructions for [Waiting List](#WL) report * Introduction of [Host Agencies](#_HOST_AGENCIES) report * Instructions for [Host Agencies](#_HOST_AGENCIES) report * Introduction of [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST) report * Instructions for [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST) Agency report * Introduction of [Employers](#_UNSUBSIDIZED_EMPLOYERS) report * Instructions for [Employers](#_UNSUBSIDIZED_EMPLOYERS) report * Note regarding outstanding rejects on [Current/Exited Report](#_CURRENT/EXITED_PARTICIPANTS) * Revision to introduction of [Started Employment](#Start_Emp) report | | | | MPR/BCT/CZ | | S. Bond | |
| 8/16/2013 | |  |  | | Reviewed changes | | | |  | | S. Craig | |
| 9/16/2013 | | 10/18/2013 | 6.4 | | Highlighted the following items yellow   * Introduction and instructions for [Pending](#Pend), [Ineligible](#_INELIGIBLE_APPLICANTS),   [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Host Agencies](#_HOST_AGENCIES), [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST), and [Employers](#_UNSUBSIDIZED_EMPLOYERS) reports   * Note regarding outstanding rejects on [Current/Exited Report](#_CURRENT/EXITED_PARTICIPANTS) * Add county of residence to [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST), [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Entered Employment](#Enter_Emp), and [Waiting List](#WL) reports. | | | | COG/BCT/MPR | | B. Hartigan | |
| 9/19/2013 | | 10/18/2013 | Future | | Highlighted the following yellow items blue for future release:  -[Host Agencies](#_HOST_AGENCIES) Blurb and Instructions  -[Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST) Blurb and Instructions  -[Unsubsidized Employers](#Emps) Blurb and Instructions  - [Entered Employment](#Enter_Emp) Instructions and Blurb | | | | COG/BCT/MPR | | B. Hartigan | |
| 10/9/2013 | | 10/18/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Removed reference to 48 month durational limit from instructions. * Revised summary counts to include multiple durational limit dates * Removed reference to 48-month durational limit date from column title * Removed * Revised logic for age calculation * Removed Status of Durational Limit from the details * Revised logic for reporting Durational Limit Dates * Removed Current Durational Limit date from Durational Limit date tables * Revised record layout and summary layout. | | | | MPR/BCT/COG | | S. Bond | |
| 10/10/2013 | | 10/18/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Highlighted Removal of County of Authorized Position yellow. | | | | MPR/BCT/COG | | S. Bond | |
| 10/16/2013 | | 10/18/2013 | 6.4 | | Renamed Blurbs as Instructions | | | | MPR | | S. Craig | |
| 10/16/2013 | | 10/18/2013 | 6.4 | | Revised the “Exited” group selection criteria in the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report. | | | | MPR/BCT/COG | | S. Craig | |
| 10/17/2013 | | 10/18/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Revised instruction text * Revised logic of *DURATIONAL LIMIT DATE* constructed variable * Revised logic of summary elements 2 thru 13 to use the individual’s durational limit date as the unit of analysis. * Added “Program Year” filter * Revised “Age When Person Was Last Extended or Exited” to utilize *REPORT RUN DATE* when no other available date.   Highlighted addition of County of Residence in the following report s blue: [Assignments by Host Agency](#_ASSIGNMENTS_BY_HOST), [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Entered Employment](#Enter_Emp), and [Waiting List](#WL)  Revised logic for “Due Date of Next IEP” in [Participant Actions](#_PARTICIPANT_ACTIONS) report | | | | MPR/BCT/COG | | S. Bond | |
| 10/17//2013 | | 10/18/2013 | Future | | Highlighted Durational Limit date filters in [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report blue for future release. | | | | MPR/BCT/COG | | S. Bond | |
| 10/18/2013 | | 10/18/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Revised logic for *DURATIONAL LIMIT STATUS* * Added “75 and Older When Person Was Last Extended or Exited” to the detail layout * Revised label for “75 and Older When 48 Month Durational Limit Was Reached” in summary table * Revised instruction text for Program Year filter. * Added text for the logic of the Program Year filter * Revised logic for “Age When Person Was Last Extended or Exited. | | | | MPR/BCT/COG | | S. Bond | |
| 10/18/2013 | |  | 6.4 | | Reviewed changes | | | |  | | S. Bond,  S. Craig | |
| 10/24/2013 | | 10/30/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:  - Revised export file specifications to display a row for each  Month of Duration, *MONTH X DURATIONAL LIMIT DATE*, and *DURATIONAL LIMIT STATUS*, instead of in separate columns.  - Revised Display Instructions to display a participant for each of their *MONTH X DURATIONAL LIMIT DATES*. | | | | MPR/BCT/COG | | T. Calise | |
| 10/25/2013 | | 10/30/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Revised language in the all specification to reflect unit of analysis * Revised “Currently Active” selection criteria to apply to Extended records only * Added Selection criteria for “Beyond durational limit” records * Revised introduction to accurately describe unit of analysis * Revised discussion of active filters in instructions to describe filters for status. * Removed “Show Only Currently Active Participants” filter button * Removed “Show Ony Exited Participants” filter button * Removed “Show Currently Active and Exited Participants” filter button | | | | MPR/BCT/COG | | S. Bond | |
| 10/25/2013 | | 10/30/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Revised Summary Count of “White” to match QPR reporting logic * Add “Two or More Races” to Summary table * Add “Two or More Races” to the details table * Add “Two or More Races” to the details export * Revised Data Element Display Layout for Summary table to include changes in the Month X Duraitonal Limit Date and the addition of “Two or More Races” * Revised Data Element Display Layout for Detail table to include “Two or More Races” * Added “Show Extended Only” filter button * Added “Show Exited Only” filter button * Added “Show Beyond durational limit Only” filter button * Revised Summary to include separate rows for Durational Limit Date Counts up to the Month 96 Durational Limit Date. * Revised Summary Count of “American Indian or Alaskan Native” to match QPR reporting logic * Revised Summary Count of “Asian” to match QPR reporting logic * Revised Summary Count of “Black, African American” to match QPR reporting logic * Revised Summary Count of “Native Hawaiian/Pacific Islander” to match QPR reporting logic | | | | MPR/BCT/COG | | S. Bond | |
| 10/29/2013 | | 10/30/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Moved the Durational limit information in the export file. | | | | MPR/BCT/COG | | S. Bond | |
| 10/29/2013 | |  |  | | Reviewed Changes | | | |  | | S. Craig | |
| 10/31/2013 | | 11/1/2013 | 6.4 | | Made the following changes to the [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report:   * Added “Show All” filter to the status filters * Add “Show All” filter description to the Instructions | | | | MPR | | S. Bond | |
| 10/31/2013 | |  | 6.4 | | Reviewed changes | | | |  | | S. Craig | |
| 11/11/2013 | | 11/12/2013 | Future | | Changed all yellow highlighting in [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report to blue highlighting for future release | | | | MPR/BCT/COG | | T. Calise | |
| 11/12/2013 | |  |  | | Reviewed Changes | | | |  | | S. Bond | |
| 12/4/2013 | | 12/5/2013 | 6.4 | | Added label description to the following reports:  [Pending](#Pend)  [Ineligible](#_INELIGIBLE_APPLICANTS)  [Eligible](#_ELIGIBLE_APPLICANTS_NOT)  [Waiting List](#WL) | | | | MPR/BCT | | S. Bond | |
| 12/5/2013 | | 12/5/2013 | 6.4 | | Revised instruction text and date filter labels for the following reports:  [Pending](#Pend)  [Ineligible](#_INELIGIBLE_APPLICANTS)  [Eligible](#_ELIGIBLE_APPLICANTS_NOT)  [Waiting List](#WL) | | | | MPR/BCT | | S. Bond | |
| 12/5/2013 | |  | 6.4 | | Reviewed changes | | | |  | | S. Craig | |
| 2/6/2014 | | 4/4/14 | 6.5 | | * Highlighted the following reports yellow: [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report, [Employer Actions](#_EMPLOYER_ACTIONS) Report * Removed non-exit condition from selection criteria of [Current/Exited](#A_E) Report * Highlighted changes to the Summary table of [MIN/WFA](#Emp_Actions) report yellow * Added non-exit condition to the selection criteria of [Eligible](#_ELIGIBLE_APPLICANTS_NOT) report * Corrected quotations in the Alpha Search Links instruction section of the following reports.   + [Pending](#Pend)   + [Ineligible](#_INELIGIBLE_APPLICANTS)   + [Eligible](#_ELIGIBLE_APPLICANTS_NOT)   + [Waiting List](#WL)   + [Current/Exited](#A_E)   + [WDL](#WDL)   + [Reached DL](#_PARTICIPANTS_WHO_REACHED)   + [Pending Followup](#_ALL_PENDING_FOLLOW-UPS)   + [Volunteerism Followup](#_VOLUNTEERISM_FOLLOW-UPS)   + [Participant Actions](#_PARTICIPANT_ACTIONS)   + [MIN/WFA](#Emp_Actions) | | | | MPR/BCT/COG | | S. Bond | |
| 2/7/2014 | | 4/4/14 | 6.5 | | Made the following revisions to the [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report   * Revised logic for constructed variables * Revised selection criteria to remove reference to ownership and focus on active assignments * Added introduction * Added instructions on alpha search links and radio buttons * Added alpha search links * Revised logic in the summary measures to redefine “Pending” and “Past Due” * Removed HA\_FEIN from details * Remove “Active” from details * Added Organization Type to details * Removed Grantee information from the summary   Made the following revisions to the [Employer Actions](#_EMPLOYER_ACTIONS) Report   * Revised selection criteria to remove reference to ownership and focus on active placements * Added note regarding field U9a * Added introduction * Added alpha search links * Added instructions on alpha search links * Removed Pending and Past due elements from Summary * Removed Grantee and Sub Grantee information from Summary * Removed FEIN from the details * Removed “Active” from the detals * Revised display of Last CS Survey dates in details | | | | COG/MPR/BCT | | S. Bond | |
| 2/10/2014 | | 4/4/14 | 6.5 | | Revised introduction of the [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report  Renumbered detail elements in the [Employer Actions](#_EMPLOYER_ACTIONS,_DISPLAYED) Report | | | | BCT/MPR | | S. Bond | |
| 2/12/2014 | | 4/4/14 | 6.5 | | Revised discussion of checkboxes in [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report  Added condition for null values in field U9a to [Employer Actions](#_EMPLOYER_ACTIONS,_DISPLAYED) Report | | | | BCT/MPR | | S. Bond | |
| 2/17/2014 | | 4/4/14 | 6.5 | | Made the following changes to the [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report   * Revised introduction * Revised Alpha Search link field name   Made the following changes to the [Employer Actions](#_EMPLOYER_ACTIONS,_DISPLAYED) Report   * Revised the annotation of the selection criteria * Removed survey date fields from the detail table. | | | | MPR/BCT/COG | | S. Bond | |
| 3/3/2014 | | 4/4/14 | 6.5 | | Highlighted the following items yellow:   * Address move in the [Pending Applicants](#Pend) Report * Addition of Case Worker to [Pending Applicants](#Pend) Report * Added Case Worker and County of Residence to [Ineligible](#_INELIGIBLE_APPLICANTS) Report * Added Case Worker and County of Residence to [Eligible](#_ELIGIBLE_APPLICANTS_NOT) Report * Added Case Worker to [Waiting List](#WL) Report * Revised Introduction and removed County of Authorized Position from [Current/Exited](#A_E) Report * Added County of Residence, Revised Labels, and addd numerator and denominator to [Achieved Employment](#Enter_Emp) Report * Removed County of Authorized Position from [WDL](#WDL) Report * Removed County of Authorized Position from [Break](#Break) Report * Added Case Worker and County of Residence to [Pending Followup](#_ALL_PENDING_FOLLOW-UPS) Report. * Added Case Worker to [Pending Followup by Month](#_ALL_PENDING_FOLLOW-UPS_1) Report * Added Case Worker to the [Assignment by Host Agency](#_ASSIGNMENTS_BY_HOST) Report * Added Case Worker, Placement Start Date and County of Residence to the [Placements by Employer](#UEs_Emp) Report * Removed County of Authorized Position from [Reached DL](#_PARTICIPANTS_WHO_REACHED) Report * Removed County of Authorized Position from [MIN/WFA](#Emp_Actions) Report   Added measures to the summary of the [MIN/WFA](#Emp_Actions) report  Added report period option to the [Started Employment](#Start_Emp) Report  Revised selection criteria of the [Started Employment](#Start_Emp) Report to include selected report period.  Revised instructions of the [Started Employment](#Start_Emp) Report  Added day counters to the [Pending Followup](#_ALL_PENDING_FOLLOW-UPS) Report | | | | MPR/BCT/COG | | S. Bond | |
| 3/4/14 | | 4/4/14 | 6.5 | | Made the following changes to the [Host Agency Actions](#_HOST_AGENCY_ACTIONS) Report   * Revised the logic for Due Date of Next Host Agency Agreement * Revised the logic for Due Date of Next Monitoring Visit | | | | MPR/COG | | S. Bond | |
| 3/14/14 | | 4/4/14 | 6.5 | | Revised the date filter labels in the [Started Employment](#Start_Emp) Report  Added selection of multiple sub-grantees to general report requirements.  Updated summary labels in the [Started Employment](#Start_Emp) Report  Revised summary measuress in the [MIN/WFA](#Emp_Actions) Report | | | | MPR | | S. Bond | |
| 3/18/14 | | 4/4/14 | 6.5 | | Revised introduction of [Current/Exited](#A_E) Report  Revised introduction of [Started Employment](#Start_Emp) Report  Revised introduction of [Achieved Employment](#Enter_Emp) Report  Revised instructions of [Achieved Employment](#Enter_Emp) Report | | | | MPR | | S. Bond | |
| 3/20/14 | | 4/4/14 | 6.5 | | Made the following changes to the [Started Employment](#Start_Emp) Report   * Removed the exit date filters * Added a Program year filter * Revised the selection criteria to account for program year filter accurately * Added criteria for Pending followup. * Revised instructions to account for multiple filters. * Added error message regarding using both filters simultaneously. | | | | MPR | | S. Bond | |
| 3/26/14 | | 4/4/14 | 6.5 | | Revised selection criteria for the [Employer Actions](#_EMPLOYER_ACTIONS,_DISPLAYED) report | | | | NZ | | S. Bond | |
| 3/27/14 | | 4/4/14 | Future | | Changed all yellow highlighting to blue for the following reports:  [Pending Applicants](#Pend) ,[Ineligible](#_INELIGIBLE_APPLICANTS), [Eligible](#_ELIGIBLE_APPLICANTS_NOT), [Waiting List](#WL), [Started Employment](#Start_Emp), [Volunteerism Followup](#_VOLUNTEERISM_FOLLOW-UPS), [Participant Actions](#_PARTICIPANT_ACTIONS), [WDL](#WDL), [Reached DL](#_PARTICIPANTS_WHO_REACHED), [Pending Followup](#_ALL_PENDING_FOLLOW-UPS), [Placements by Employer](#UEs_Emp), [Break](#Break), [Assignment by Host Agency](#_ASSIGNMENTS_BY_HOST)  Changed the following items in the [MIN/WFA](#Emp_Actions) Report from yellow highlighting to blue:   * Add "Percent of Participants 1 year from Durational Limit" to summary table * Add "Number of Participants with Waiver Factors in need of update in Current Program Year" to summary table * Add "Percent of Participants with Waiver Factors in need of update in Current Program Year" to summary table * Add "Number of Participants with Waiver Factors in need of update in Previous Program Year" to summary table * Add "Percent of Participants with Waiver Factors in need of update in Previous Program Year" to summary table * Add "Number of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year" to summary table * Add "Percent of Participants 1 year from Durational Limit with Waiver Factors updated in Current Program Year" to summary table * Add "Number of Participants with Durational Limit Date and updated Waiver Factor in Current Program Year" to summary table * Add "Percent of Participants with Durational Limit Date and updated Waiver Factor in Current Program Year" to summary table * Change order of elements in the export   Changed the following items in the [Achieved Employment](#Enter_Emp) Report from yellow highlighting to blue:   * Show numerator and denominator for Preliminary Retention Rate (Q) * Show numerator and denominator for Preliminary Retention Rate (YTD) * show numerator and denominator for Preliminary Retention Rate (L4Q) * Add County of Residence * Add Case Worker | | | | MPR/BCT/COG | | T. Calise | |
| 3/27/14 | | 4/4/14 | Future | | Added Multiple Sub-Grantee Selection option to the following reports:   * [Started Employment](#Start_Emp) * [Achieved Employment](#Enter_Emp)   Updated Instructions for the following reports:   * [Started Employment](#Start_Emp) * [Achieved Employment](#Enter_Emp) | | | | BCT | | S. Bond | |
| 3/27/14 | | 4/4/14 | 6.5 | | Removed discussion of Multiple Sub-Grantee Selection from the general requirements section  Added Multiple Sub-Grantee Selection option to the following reports:   * [Current/Exited](#A_E) * [Pending Followup by Quarter](#_ALL_PENDING_FOLLOW-UPS_1) * [MIN/WFA](#Emp_Actions)   Updated Instructions for the following reports:   * [Current/Exited](#A_E) * [Pending Followup by Quarter](#_ALL_PENDING_FOLLOW-UPS_1) * [MIN/WFA](#Emp_Actions) | | | | MPR/NZ | | S. Bond | |
| 3/28/14 | | 4/4/14 | 6.5 | | Highlighed the following changes yellow:   * Multiple Sub Grantee Selection options and instructions update for [Started Employment](#Start_Emp) * Multiple Sub Grantee Selection options and instructions update for [Achieved Employment](#Enter_Emp) * Revision of introduction for [Started Employment](#Start_Emp) report * Revision of Alpha Search Link instructions for [Started Employment](#Start_Emp) report | | | | BCT/NZ | | S. Bond | |
| 4/2/14 | | 4/4/14 | 6.5 | | Revised the discussion of the date filter labels in the [Achieved Employment](#Enter_Emp) report | | | | BCT/MPR | | S. Bond | |
| 4/3/14 | | 4/4/14 | 6.5 | | Revised the description and instructions for the Multiple Sub-Grantee selection for the following reports.   * [Current/Exited](#A_E) * [Pending Followup by Quarter](#_ALL_PENDING_FOLLOW-UPS_1) * [MIN/WFA](#Emp_Actions) * [Started Employment](#Start_Emp) * [Achieved Employment](#Enter_Emp)   Added Appendix B  Revised General Requirements to include discussion of multiple sub-grantee selection | | | | BCT/MPR | | S. Bond | |
| 4/3/14 | |  | 6.5 | | Changes reviewed | | | |  | | S. Craig | |
| 7/10/14 | | 7/23/14 | NA | | Added a Displayed Data Element Layout section to each of the [Host Agency Actions](#_HOST_AGENCY_ACTIONS) and [Employer Actions](#_EMPLOYER_ACTIONS) reports | | | | MPR | | T. Calise | |
| 7/21/14 | | 7/23/14 | Future | | Added “Date of Placement” and “Last Date to Deliver Employer Survey” to Detail Elements of[Employer Actions](#_EMPLOYER_ACTIONS) report | | | | COG | | T. Calise | |
| 7/23/14 | | 7/23/14 | 6.5.2 | | Removed ability to select multiple sub-grantees from the [Current/Exited](#A_E) report  Revised instructions for the [Current/Exited](#A_E) report | | | | BCT/COG | | S. Bond | |
| 7/23/14 | |  |  | | Reviewed by BCT | | | |  | | S. Bond | |
| 8/19/14 | |  | Future | | Revised introduction text of the [Employer Actions](#_EMPLOYER_ACTIONS) report  Added Employer Contact Information to the details of the [Employer Actions](#_EMPLOYER_ACTIONS) report  Added the Contact, Date of Placement, and Last Date to Deliver Employer Survey details elements to the Displayed Data Element Layout section of the [Employer Actions](#_EMPLOYER_ACTIONS) report | | | | COG | | T. Calise | |
| 8/26/14 | |  | 6.5.3 | | Removed “Number of Participants Affecting Retention This Quarter” from summary of [Achieved Employment](#Enter_Emp) report | | | | BCT/COG | | S. Bond | |
| 9/8/14 | |  |  | | Reviewed changes | | | |  | | S. Craig | |
| 12/11/14 | | 12/19/14 | 6.6 | | Revised [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report with the following:  - Added condition to selection criteria for survey due date  - Removed condition on placement end date from selection criteria  - Replaced logic around surveyed program year  - Revised Date of Placement, Last Date to Deliver Employer Survey.  - Added Active with Multiple Grantees or Sub-Grantees, Participant about Whom the Employer is being Surveyed  - Added measures to the summary table  - Revised the display layout of the summary and the detail  - Removed employer survey program year from details | | | | BCT/COG | | S. Bond | |
| 12/18/14 | | 12/19/14 | Future | | Changed highlighting to blue for the Export Instructions in the[Volunteerism Followup](#_VOLUNTEERISM_FOLLOW-UPS) report | | | | NZ | | T. Calise | |
| 12/18/14 | | 12/19/14 | 6.6 | | Revised the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report with the following:  - Replaced the condition in the selection criteria where Placement start date is greater than or equal to Survey Due Date with Placement start date is greater than or equal to Survey due date minus 100 days  - Removed the condition in the selection criteria where *REPORT RUN DATE* minus PLACEMENT START DATE <=100  - Revised the summary counts to have the following groupings for the days left until a pending Employer Survey is expired:  - 1-30 days  - 31-60 days  - 61-80 days  - 81-100 days  - Updated the display layout of the summary to include the new groupings for the days left until a pending Employer Survey is expired  - Updated name of constructed variable *SURVEY DUE DATE* to *SURVEY ELIGIBLE DATE* | | | | BCT/MPR/COG | | T. Calise, S. Bond | |
| 12/19/14 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 12/22/14 | | 12/22/14 | 6.6 | | Revised the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report in the following ways:  - Replaced the instance of *SURVEY DUE DATE* in the selection crtieria with *SURVEY ELIGIBLE DATE*  - Added a condition that PLACEMENT START DATE <= *REPORT RUN DATE* to the selection criteria  - Revised the annotation in row 6 of the selection criteria to include the phrase: or the employer is new and has not surveyed their first placement  - Revised the sort order so that within each sub-grantee, records are sorted by the Number of Days from Placement Start Date descending  - Revised all summary elements to consider Grantee/Sub-grantee as well as Employer  - Replaced all instances of the phrase “from expiration” with “from Placement Start Date” in the summary elements and the Displayed Data Elements Layout  - Added the detail element Number of Days from Placement Start Date to the details and the Displayed Data Elements Layout  - Revised the detail element Date on which Employer was last Surveyed to not use SURVEY ELIGIBLE DATE minus 365 days | | | | BCT/MPR/COG/NZ | | T. Calise | |
| 12/22/14 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 1/7/15 | | 1/8/15 | 6.6 | | Revised the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report in the following ways:   * Removed the footnotes regarding field U9a * Revised the description of summary elements 2, 3, 4, and 5 to reference Number of Days from Placement Start Date * Revised selection criteria to address unsurveyed employers and old placement records * Added that the count of the detail element Number of Days from Placement Start Date should be inclusive | | | | NZ | | T. Calise | |
| 1/8/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 1/12/15 | | 1/12/15 | 6.6 | | * Revised the annotation for row 7 of the selection criteria on the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report to more accurately describe the specification * Added a note to the selection criteria of the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report regarding nultiple UE’s with the same start date | | | | MPR/NZ | | T. Calise | |
| 1/12/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 1/22/15 | | 1/22/15 | 6.6 | | Revised the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report in the following ways:  - Revised the text in the summary elements and the Displayed Data Elements Layout for summary elements 2 – 5 to read “days from expiration” instead of “days from Placement Start Date”  - Revised the selection criteria to only consider placements with placement start dates less than 100 days from the *REPORT RUN DATE*  - Revised the specifications for summary elements 2 – 5 to require Number of Days from Placement Start Date be between the following day ranges (respectively):  - 71 days to 100 days  - 41 days to 70 days  - 21 days to 40 days  - 1 days to 20 days | | | | MPR/NZ | | T. Calise | |
| 1/22/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 2/3/15 | |  | 6.6 | | Made the following changes to the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report Displayed Data Element Layout:   * Added a space between the words “Employer” and “Survey” in the text for Summary Element 1. * Added a colon to the end of the text for Summary Elements 2 – 5. * Added a colon to the end of the text for Detail Elements 13 – 18. | | | | MPR | | T. Calise | |
| 2/3/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 2/12/15 | | 2/13/15 | 6.6 | | Revised the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report in the following ways:   * Revised row 6 of the selection criteria to check if an employer is not a host agency for individual placement records. * Revised row 18 of the details to only choose the LAST\_NAME, FIRST\_NAME, and PID from the participant associated with the latest PLACEMENT START DATE from all placements associated with the Grantee/Sub-grantee and Employer that satisfy the Selection Critera. | | | | COG/NZ | | T. Calise | |
| 2/13/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 2/18/15 | | 2/18/15 | 6.6 | | Revised Host agency condition in [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report details field “Date on which Employer was last Surveyed” | | | | COG/NZ | | S. Bond | |
| 2/18/15 | |  |  | | Reviewed changes | | | |  | | T. Calise | |
| 2/27/15 | | 2/27/15 | 6.6 | | Made the following changes to the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report:   * Revised selection criteria to consider whether the placement record is the earliest. * Removed redundant condition regarding Placement Start Date. * Removed “Active with Multiple Sub-Grantees” flag from report detail * Revised the following detail elements to consider the earliest placement:   + Date of Placement for Pending Survey   + Number of Days from Placement Start Date   + Last Date to Deliver Employer Survey   + Participant about Whom the Employer is being Surveyed | | | | BCT/COG/NZ | | S. Bond | |
| 2/27/15 | |  |  | | Reviewed changes | | | |  | | T. Calise | |
| 2/27/15 | | 2/17/15 | 6.6 | | Made the following changes to the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report:   * Revised language in the selection criteria * Revised groupings in the summary table | | | | COG/NZ | | S. Bond | |
| 2/27/15 | |  |  | | Reviewed changes | | | |  | | T. Calise | |
| 3/4/15 | | 9/2/15 | 6.6 | | Made the following change to the [Pending Employer Surveys](#_EMPLOYER_ACTIONS) report:   * Changed the name of detail element #14 to Date of Placement for Pending Employer Survey | | | | NZ | | T. Calise | |
| 3/18/15 | |  |  | | Reviewed changes | | | |  | | S. Bond | |
| 5/18/15 | | 9/2/15 | 6.7 | | Highlighted the introductory text and instructions yellow for the following reports:   * [Host Agencies](#_HOST_AGENCIES) * [Employers](#_UNSUBSIDIZED_EMPLOYERS) | | | |  | | S. Bond | |
| 5/20/15 | |  |  | | Reviewed changes | | | |  | | T. Calise | |
| 8/19/15 | | 9/2/15 | 6.8 | | Correct placement of quotation mark in instructions section of the following reports:   * [Pending Applicants](#Pend) * [Ineligible Applicants](#_INELIGIBLE_APPLICANTS) * [Eligible Applicants](#_ELIGIBLE_APPLICANTS_NOT) * [Waiting List](#WL) * [WDL](#WDL) * [RDL](#_PARTICIPANTS_WHO_REACHED) * [Break](#Break) * [Pending Followups](#_ALL_PENDING_FOLLOW-UPS) * [Volunteerism Followups](#_VOLUNTEERISM_FOLLOW-UPS) * [Host Agencies](#HAs) * [Employers](#Emps) * [Participant Actions](#_PARTICIPANT_ACTIONS) | | | | NZ | | S. Bond | |
| 8/19/15 | |  | 6.8 | | Reviewed changes | | | |  | | T. Calise | |
| 8/20/15 | | 9/2/15 | NA | | Inserted a missing double quote into the Date Filters Instruction text of the [Waiting List](#WL) report | | | |  | | T. Calise | |
| 9/2/15 | |  | 6.8 | | Reviewed changes | | | |  | | S. Bond | |
| 12/3/15 |  | | | N/A | | | Moved old rows in this table to [Archived Revision History Table](#_Appendix_A_--) appendix | MPR | | T. Calise | |
| 12/16/15 | 1/11/16 | | | 6.9 | | | - Revised the calculation of “Date Expected to Reach Durational Limit” in the [MIN/WFA](#Emp_Actions) and the [WDL](#WDL) report  - Revised note on the [RDL](#_PARTICIPANTS_WHO_REACHED) report | BCT/COG | | S. Bond | |
| 12/17/15 |  | | |  | | | Reviewed Changes |  | | T. Calise | |
| 2/1/16 | 2/1/16 | | | 6.9 | | | Highlighted note on the [RDL](#_PARTICIPANTS_WHO_REACHED) report as completely new for release | MPR/NZ | | S. Rose | |
| 2/1/16 |  | | |  | | | Reviewed Changes |  | | S. Bond | |
| 3/24/16 | 4/15/16 | | | 7.0 | | | Made the following changes to the [WDL](#WDL) report:  - Added summary groups to include 30- and 45-days from DLD categories.  - Revised summary group names to refer to months rather than quarters and adjusted sort order to show those nearest their DLD first.  - Expanded range of *DAYS LEFT* values for included participants up to 396 days.  - Added Participant Address and Participant Email to report details.  - Removed County of Authorized Position from report details.  Made the following changes to the [Current/Exited](#A_E) report:   * Added Application Date to report details. * Added Initial Assignment Date to report details. | MPR/BCT/COG | | J.Kozar | |
| 4/5/16 |  | | | 7.0 | | | Reviewed changes |  | | S. Rose | |
| 4/22/16 | 4/25/16 | | | 7.0 | | | Changed the warning message on the [WDL](#WDL) report | BCT/COG | | S. Bond | |
| 4/22/16 |  | | | Future | | | Highlighted changes to the [WDL](#WDL) and [Current/Exited](#A_E) blue for future release | BCT/COG | | S. Bond | |
| 4/25/16 |  | | | 7.0 | | | Reviewed changes |  | | S. Rose | |
| 8/10/2016 |  | | | 7.1 | | | Changed the highlighting of the Current and Prior Program Year Waiver Factor filters on the [MIN/WFA](#Emp_Actions) report to yellow | MPR/BCT/COG | | T. Calise | |
| 8/10/2016 |  | | | 7.1 | | | - Changed the order in which individuals appear on the [WDL](#WDL) report, with those nearest to reaching durational limit first.  - Added Termination Letter Due Date to [WDL](#WDL) report. | MPR/BCT/COG | | J. Kozar | |
| 9/6/2016 |  | | | 7.1 | | | Added specifications to the [MIN/WFA](#Emp_Actions) report details for displaying an “Overdue” or “Not Overdue” indicator for waiver factors. | MPR/BCT/COG | | T. Calise | |
| 9/21/2016 |  | | | 7.1 | | | Reviewed changes |  | | S. Rose | |
| 11/21/2016 | 12/6/2016 | | | Future | | | Highlighted program year filters on the [MIN/WFA](#Emp_Actions) report for a future release. | MPR/BCT/COG | | S. Bond | |
| 12/6/2016 |  | | | Future | | | Reviewed changes |  | | S. Rose | |
| 12/21/2016 | 1/31/2017 | | | 7.2 | | | Highlighted program year filters and specifications for “Overdue” and “Not Overdue” indicators on the [MIN/WFA](#Emp_Actions) report for release 7.2 | MPR/BCT/COG | | J. Kozar | |
| 12/27/2016 | 1/31/2017 | | | 7.2 | | | Updated logic for Severe Disability Date for Current PY (data element #21) and Previous PY data elements #29 thru 34 to address the addition of “Overdue” and “Not Overdue” values on the [MIN/WFA](#Emp_Actions) report. | MPR/BCT/COG | | J. Kozar | |
| 12/28/2016 |  | | | Future | | | Revised the sort order and data element layout for the [Participant Actions](#_PARTICIPANT_ACTIONS) report for release 7.2, and added Participant Email Address to the report detail. | MPR/BCT/COG | | J. Kozar | |
| 1/31/2017 | 1/31/2017 | | | 7.2 | | | Added instructions for the program year filters. Updated language for [MIN/WFA](#Emp_Actions) report to display “still time for credit” for unfilled waiver factors in Q5 and “too late for credit” thereafter. | MPR/BCT/COG | | W. Leith | |
| 1/31/2017 |  | | | 7.2 | | | Reviewed changes |  | | S. Bond | |
| 2/16/17 | 2/16/17 | | | 7.2 | | | Revised the logic for summary element 10 of the [MIN/WFA](#Emp_Actions) report to look for MONTH X DLD values within the current program year. | MPR/BCT/COG | | J. Kozar | |
| 2/16/17 |  | | | 7.2 | | | Reviewed changes |  | | S. Bond | |
| 4/4/17 | 4/11/17 | | | Future | | | Highlighed [MIN/WFA](#Emp_Actions) summary elements 10 & 11 for a future release. | MPR/BCT/COG | | J. Kozar | |
| 4/11/17 |  | | |  | | | Reviewed changes |  | | S. Bond | |
| 4/18/17 |  | | | 7.3 | | | Revised [MIN/WFA](#Emp_Actions) summary elements 10 & 11 and added summary elements 12 & 13. | MPR/BCT/COG | | J. Kozar | |
| 5/2/17 |  | | | Future | | | Added new categorical variables to [Participant Actions](#_PARTICIPANT_ACTIONS) report, added information on sort order for export file, and indicated that enrollments with multiple assignments should not be displayed if the safety consultation checkbox is selected. | MPR/BCT/COG | | W. Leith | |
| 6/15/17 |  | | | N/A | | | Added information regarding the display of Report Date to the [General Requirements](#_General_Requirements/Instructions) | MPR | | S. Bond | |
| 6/20/17 |  | | | 7.3 | | | Added Break Reason and revised summary measure for average days on approved break for [Break](#Break) Report  Added Date of Last Customer Service Survey to [Employer](#Emps) Report  Added information regarding the most recent Business Intelligence Process to the [General Requirements](#_General_Requirements/Instructions)  Added label to BI process time in the [General Requirements](#_General_Requirements/Instructions)  Revised the note in the “Active” detail on the [Employer](#Emps) Report. | MPR/BCT/COG | | W. Leith, S. Bond | |
| 6/20/17 |  | | | 7.3 | | | Reviewed changes | MPR/BCT/COG | | S. Bond | |
| 4/3/18 | 5/4/18 | | | 7.5 | | | Added specifications for new report: [Employment Rate/Median Earnings in X Quarter After Exit](#EmpRate_MedianEarnings) report | MPR/BCT/COG | | J. Kozar | |
| 4/9/18 | 5/4/18 | | | 7.5 | | | Added specifications for new report: [All PY 2018 Pending FollowUps](#PendFU_PY2018) | MPR/BCT/COG | | J. Kozar | |
| 4/18/18 | 5/4/18 | | | 7.5 | | | Updated specifications for [Employment Rate/Median Earnings in X Quarter After Exit](#EmpRate_MedianEarnings) and [All PY 2018 Pending FollowUps](#PendFU_PY2018) reports to refer to Q2FUED constructed variable instead of Q1FUED and Q2Q3FUED. | MPR/BCT/COG | | J. Kozar | |
| 4/19/18 | 5/4/18 | | | 7.5 | | | Updated PY18\_EXIT\_REASON\_OTHER criteria in pending follow-up specifications for the [Employment Rate/Median Earnings in X Quarter After Exit](#EmpRate_MedianEarnings) and [All PY 2018 Pending FollowUps](#PendFU_PY2018) reports | MPR | | J. Kozar | |
| 4/20/18 | 5/4/18 | | | 7.5 | | | Removed “vii\_Unable” from Negative Outcome(s) condition for “Reason not counted in measure” detail element in [Employment Rate/Median Earnings in X Quarter After Exit](#EmpRate_MedianEarnings) report | MPR/BCT/COG | | J. Kozar | |
| 4/24/18 | 5/4/18 | | | Future | | | Renamed Employment Rate/Median Earnings in X Quarter After Exit Report to [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report.  Updated selection critera, user inputs, and Summary and Detail elements for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report.  Updated detail elements and exclusions in the selection criteria of [All PY 2018 Pending FollowUps](#PendFU_PY2018) report.  Marked [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) and [All PY 2018 Pending FollowUps](#PendFU_PY2018) reports for Future release. | MPR/BCT/COG | | J. Kozar | |
| 5/4/18 | 5/31/18 | | | 7.6 | | | Marked [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) and [All PY 2018 Pending FollowUps](#PendFU_PY2018) reports for release 7.6 |  | |  | |
| 5/30/18 | 5/31/18 | | | 7.6 | | | Revised Follow Up 3 specifications for [All PY 2018 Pending FollowUps](#PendFU_PY2018) | MPR | | J. Kozar | |
| 5/31/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 6/13/18 | 6/14/18 | | | 7.6 | | | Revised selection criteria around PY18\_Exit\_Reason\_Other to also reference Exit\_Reason\_Other field for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) and [All PY 2018 Pending FollowUps](#PendFU_PY2018) reports  Corrected typing error in label of summary element 2  “Number employed during the fourth quarter” for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report | MPR/BCT/COG | | J. Kozar | |
| 6/14/18 | 6/14/18 | | | 7.6 | | | Revised Detail for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report to label enrollments with successful follow-ups, and added filters to allow user to show/hide such enrollments. | MPR/BCT/COG | | J. Kozar | |
| 6/14/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 6/20/18 | 6/20/18 | | | 7.6 | | | Revised detail element 6 (Median Earnings Follow-up Status) for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report to require all relevant follow-ups to be complete in order to be considered successful | MPR/BCT/COG | | J. Kozar | |
| 6/21/18 | 6/21/18 | | | 7.6 | | | Revised specs for [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report | MPR/BCT/COG | | J. Kozar | |
| 6/21/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 6/25/18 | 6/28/18 | | | 7.6 | | | Added lines 7 and 10 to the FU2 specifications in the [All PY 2018 Pending FollowUps](#PendFU_PY2018) report  Added line 9 to the FU3 specifications in the [All PY 2018 Pending FollowUps](#PendFU_PY2018) report  Added condition on PY18\_FU\_1\_WAGES\_TEXT to the pending follow-up 2, overdue follow-up 2, and expired follow-up 2 specifications in the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report |  | | B. Li | |
| 6/27/18 | 6/28/18 | | | 7.6 | | | Made the following changes to the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report:  Followup Status Constructed Variable   * added conditions for the FU1 Wages text to the logic for determining pending and overdue FU2 * added a category called “No UEs ever” to account for enrollments that do not have an associated UE * changed the category name “No UEs during the Xth quarter after exit” to “No UEs lasting into Xth quarter after exit” for all measures * added conditions to the “Successful Follow-up 2” category   Selection criteria   * removed the condition on Initial placement start date * added a condition on non-exit reason * added selection criteria for a sixth report option titled “All Enrollments with negative outcomes”   Instructions   * added text to the instructions explaining the meaning of the enrollment statuses * changed the labels of the radio buttons * added a sixth radio button for “Show All Unsuccessful Enrollments with negative outcomes”   Summary   * changed label for item 2 in the employment rate summary * added conditional logic for items 2 and 3 of the summary * removed language requiring the use of a specific selection criteria * revised logic for item 2 of the median earnings summary * changed labels on items 3 of the median summary   Detail   * Changed the label for item 6 in the detail | MPR/BCT/COG | | J. Kozar | |
| 6/28/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 7/5/18 | 7/6/18 | | | 7.6 | | | Made the following changes to the [PY18 Pending Follow-up Report](#PendFU_PY2018)  - Corrected reference to “FIRST\_QTR\_WAGES\_TEXT” on line 7 of the FU2 specification  - Revised condition around completed follow-up 2 to work at the placement level  Revised labels on the summary of the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report. | MPR/BCT/COG | | S. Rose, S. Bond | |
| 7/5/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 7/16/18 | 7/16/18 | | | 7.6 | | | Revised condition on EXIT\_REASON\_OTHER and PY18\_EXIT\_REASON\_OTHER for [PY18 Pending Follow-up Report](#PendFU_PY2018) and [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report.  Revised summary-level elements labels to match displayed data element names in the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report | MPR | | B. Li | |
| 7/16/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 7/23/18 | 7/23/18 | | | 7.6 | | | Added text to Follow-up Status definition and detail-level elements section of [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report stating that only UE records should be included.  Reordered text to put “for each placement associated with this enrollment” at top of conditions list for “No UEs lasting into X quarter after exit” and “Successful Follow-up 2” Follow-up Status in [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report | NSI/MPR | | J. Kozar | |
| 7/23/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Bond | |
| 7/31/18 | 7/31/18 | | | 7.6 | | | Made the following changes to the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report   * Added a note describing how to handle placements with no followup records * Corrected typo in the definition of “Expired Follow-up 3”. | BCT/COG/MPR/NSI | | S. Bond | |
| 7/31/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Rose | |
| 8/1/18 | 8/1/18 | | | 7.6 | | | Revised note on followup records in the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report | NSI | | S. Bond | |
| 8/1/18 |  | | | 7.6 | | | Reviewed changes |  | | S. Rose | |
| 8/20/18 |  | | | 7.7 | | | In the [Current/Exited Report](#A_E):  - Added PY18 EXIT REASON to   * Percent Exiting for Other Reasons * Percent Excluded at Exit and * “Exited” records   - Removed Entered Employment Achieved  Moved the order that the FOLLOWUP STATUS constructed variable is evaluated in the [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE) Report | BCT/COG/MPR | | K. Campbell, S. Bond | |
| 8/21/18 |  | | | 7.7 | | | Reviewed changes |  | | S. Rose | |
| 9/5/18 |  | | | 7.7 | | | Updated selection criteria for [PY18 Pending Follow-up Report](#PendFU_PY2018) | NSI | | J. Kozar | |
| 9/11/18 |  | | | 7.7 | | | Reviewed changes |  | | S. Bond | |
| 11/28/18 | 12/18/18 | | | 7.8 | | | Revised calculation of Median Earnings summary element in [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE) Report to include all enrollments with a successful Follow-up 1. | COG/BCT | | J. Kozar | |
| 12/17/18 | 12/18/18 | | | 7.8 | | | In the [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE)  -Revised to include a date filter on the summary of median earnings.  -Changed the drop-down menu for Report Period for Median Earnings to start on or after Q2PY18.  - Added a note/placeholder instructing grantees to ignore the Q1PY18 results.  Added a date filter to the exit\_date for PY18 follow-ups in [All PY 2018 Pending FollowUps](#PendFU_PY2018).  Added a column to the [Current/Exited Report](#A_E) to include PY18 EXIT REASON OTHER. | COG/BCT | | K.Campbell | |
| 12/17/18 |  | | | 7.8 | | | Reviewed changes |  | | S. Bond | |
| 12/18/18 | 12/18/18 | | | 7.8 | | | Revised [Current/Exited Report](#A_E) to display “N/A” for exit dates after 7/1/2018 for “Exclusion Discovered After Exit” and “Date Exclusion After Exit Was Discovered” | COG/BCT | | K. Campbell | |
| 12/18/18 |  | | | 7.8 | | | Reviewed changes |  | | S. Bond | |
| 12/28/18 | 12/28/18 | | | 7.8 | | | Added PY18 Other exit reason to detail of the [Current/Exited Report](#A_E)  Revised note on the [Preliminary Employment Rate/Median Earnings](#_PRELIMINARY_EMPLOYMENT_RATE) | COG/BCT/NSI | | S. Bond | |
| 12/28/18 |  | | | 7.8 | | | Reviewed changes |  | | K. Campbell | |
| 1/4/19 | 1/8/19 | | | 7.8 | | | Revised Follow Up 2 specifications for [All PY 2018 Pending FollowUps](#PendFU_PY2018) – FU2 no longer should select self employment placements. | BCT/COG | | A. Millar | |
| 1/8/19 |  | | | 7.8 | | | Reviewed changes |  | | S. Bond | |
| 1/11/19 | 1/11/19 | | | 7.8 | | | Made the following changes to the [Preliminary Emploment Rate/Median Earnings](#EmpRate_MedianEarnings) report   * Updated Median Earnings summary elements 2 and 3 to reflect current condition of SPARQ * Revised definitions of Pending Follow-up 2, Overdue Follow-up 2 and Expired Follow-up 2 | BCT/COG/MPR | | J. Kozar | |
| 1/11/19 |  | | | 7.8 | | | Reviewed changes |  | | S. Bond | |

# Appendix B – Reports that Allow Multiple Sub-Grantee Selection

|  |  |
| --- | --- |
| **Name of Report** | **Allow Multiple Sub-Grantee Selection?** |
| Pending Applicants | No |
| Ineligible Applicants | No |
| Eligible Applicants Not Assigned Or On Waiting List | No |
| Waiting List | No |
| Current/Exited Participants | No |
| Participants Who Have Started Employment But Not Yet Achieved Entered Employment | Yes |
| Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention | Yes |
| Participants Who Have Achieved Entered Employment But Not Yet Achieved Retention at 1 Year | No |
| Waiver of Durational Limit | No |
| Participants Who Have Reached Durational Limit | No |
| Participants With Approved Break(s) | No |
| All Pending Follow-Ups | No |
| All Pending Follow-Ups Displayed By Quarter | Yes |
| Volunteerism Follow-Ups | No |
| Host Agencies | No |
| Assignment By Host Agency | No |
| Unsubsidized Employer | No |
| Placements By Employer | No |
| Participant Actions | No |
| Participant Actions, Displayed By Month | No |
| Host Agency Actions | No |
| Host Agency Actions, Displayed By Month | No |
| Employer Actions | No |
| Employer Actions, Displayed By Month | No |
| Most In Need/Waiver Factor Actions | Yes |