

## ATTACHMENT B

### How to Use the WIA Title I Performance Review Tool

The Title I Performance Reports submitted to the U. S. Department of Labor (USDOL) each quarter are generated from the federal reporting software Data Analysis and Reporting Tool (DART) created by America’s Job Link Alliance (AJLA). Following each federal report submission a new, modified table named *cs\_cmwiaq\_data* is created in MOSES from the DART file. The local quarterly performance summaries are created from this table. The Performance Charts are available on the Reports menu in MOSES but also appear in the quarterly Career Center Performance Reports posted at [www.massworkforce.org](http://www.massworkforce.org). In addition, the Career Center Performance Reports books are distributed each quarter to the standard distribution list for workforce issuances.

The Performance Review Tool is a local use Crystal Report that runs from the *cs\_cmwiaq\_data* table to provide information about specific participants that affect outcomes on specific performance measures. The report enables local operators to review and follow-up on participants that are included in the denominator but not in the numerator of a performance calculation (thus having a negative impact on the performance percentage).

The Performance Review Tool should be used each quarter as soon as the Performance Charts are issued and/or posted. Prompt staff follow-up and updating of participant records in MOSES will assure that the new information will be reported in the next quarterly report.

#### Individuals Missing from Numerator

In preparation for running the Review Tool, it is necessary to print and review the most recent quarter’s Title I Performance Summary by Area. A sample is illustrated in **Figure 1** below, Performance Chart 1 - Adult Entered Employment Rate, the total number of Entered Employments (column H – the numerator) for the Boston area is 18. The total number of Adjusted Exitters (column E – the denominator) is 23. The numerator 18 divided by the denominator 23 produces an Entered Employment rate of 78% (column I – the rate). Five exitters (23-18 = 5) are missing from the numerator, i.e., were not found in wage matching and did not have supplemental employment (column G) entered in MOSES.

*Figure 1*

COMMONWEALTH OF MASSACHUSETTS WIA TITLE I PERFORMANCE MEASURES: FY05 QUARTERLY PERIOD ENDING 09/30/2004 CHART 1- ADULT ENTERED EMPLOYMENT RATE & EARNINGS IN FIRST QUARTER AFTER EXIT										
Workforce Investment Area	[B] Total Number of Exitters	[C] Medical & Other Exclusions	[D] Employed at Registration	[E=B-C-D] Adjusted Number of Exitters	[F] Number of Wage Record Matches	[G] Number of Supplemental Employments	[H=F+G] Total Number of Entered Employments	[I=H/E] Entered Employment Rate	[J] Local Performance Level Goal	[K=I/J] Percent of Local Goal
Berkeleyshire	3	0	1	2	2	0	2	100%	74%	135%
Boston	29	1	5	23	18	0	18	78%	70%	112%

## Identification and Follow-up

The *Performance Review Tool* for the Adult Entered Employment measure cited in the Boston example above would produce a list of the five (5) individuals that are missing from the numerator along with the most recent contact information found in MOSES. File review or follow-up contact with individuals may reveal that they were not matched in wage records during the first quarter after exit from Title I because they were:

- self-employed;
- employed but not yet reported in wage records by employer
- employed by the federal government or other non-wage record reporting employer; or
- employed in a state not participating in the national wage record information exchange.

Information for those determined to be working should be entered in MOSES as *employment follow-up services*. These participants would then be counted in the numerator for the next quarterly performance report, increasing the area's Adult Entered Employment Rate. Data entered through the end of a quarter, will appear in the next performance report submitted 45 days after the quarter end. For instance, data entered by June 30<sup>th</sup> will affect the report submitted August 15<sup>th</sup>.

## Issues to Consider for Individuals Missing from Numerators

*Note: The WIA Title I Performance Review Tool can be used for 11 of the 17 performance measures. Younger Youth Skill Attainment Rate, Customer Satisfaction and earnings measures are not addressed by this tool.*

Individuals not matched in first post-exit quarter in wage records that do not have employment follow-up posted to MOSES: For records not matched in wage records, USDOL accepts *supplemental information* on employment status in the first post-program quarter in the calculation of Entered Employment Rate and the Employed-with-Credential Rate. USDOL also accepts *supplemental information* on employment status in the second and third post-program quarters in the calculation of Retention Rate. For Older Youth, retention in post-secondary education or advanced training are also positive outcomes; however, retention in the first and/or third post-program quarter must be entered in MOSES for these outcomes to be “credited” in the employment and retention measures.

Individuals without a credential posted to MOSES: Adults and dislocated workers who received training services comprise the base of the Employed-with-Credential Rate. All Older Youth, regardless of program activity, are subject to the Employed-with-Credential measure.

Younger Youth without wage record matches or without other MOSES status that has a positive impact on the Retention Rate: For Younger Youth not in high school at exit, retention in employment, the military, post-secondary education and advanced training will be counted as retention. Younger Youth who exit Title I while still attending high school are exempt from the Retention measure so it is important to record the attending high school at exit status in MOSES.

Younger Youth who exited without diploma/GED: Title I Younger Youth Exiters who were listed as high school students or dropouts at registration in MOSES, who exited without a diploma/GED and without being listed as still attending high school at exit, for the performance period. If any of these exiters did receive a diploma/GED within one quarter of their exit or were attending high school at exit, this information should be posted on MOSES. Adding their diploma/GED will include them in the numerator of the Diploma/GED Rate. Adding an 'Attending Secondary School at Exit' (a good possibility for many of the younger exiters) as an outcome will exclude them from the denominator of this performance measure.

## **Using Crystal Report Software to Run the Title I Performance Review Tool**

In Crystal Report version 9 or higher, start by clicking on the ***Lightning Bolt*** (*Recycle Arrows on version 11*) on the Crystal toolbar. You will be prompted for:

- 1) Local Area, and
- 2) Performance Measure (as listed below).

The *Performance Review Tool* will return a list of the exiters that are missing from the numerator of the rate calculation for the following performance measures:

### **Adult, Dislocated Worker and Older Youth Entered Employment**

Individuals listed are those who have not been matched in wage records for the first quarter after exit, and do not have supplemental employment information entered in MOSES. Where appropriate, supplemental data may be added by entering:

- Employment Follow-up for the appropriate post month. (see supplemental employment follow-up chart)

### **Adult and Dislocated Worker Credential & Employment**

Individuals listed are those who have not been matched in wage records for the first quarter after exit and/or have not attained a credential. Where appropriate, supplemental data may be added by entering:

- Employment Follow-up for the appropriate post month. (see supplemental employment follow-up chart), and/or a
- General Service of Outcome/Enhancement – Attained Certificate, License or Degree.

### **Older Youth Credential and Employment/Education**

Individuals listed are those who have not been matched in wage records for the first quarter after exit and/or have not been retained in education in the first quarter after exit and/or have not attained a credential. Appropriate supplemental data may be added by entering:

- Employment Follow-up for the appropriate post month. (see supplemental employment follow-up chart); and/or
- General Service of Education Retention, Month 1 – 3; *and*
- General Service of Outcome/Enhancement – Attained Certificate, License or Degree.

### **Adult, Dislocated Worker and Older Youth Employment Retention**

Individuals listed are those who were employed in the first quarter after exit but have not been matched in wage records for both the second and third quarters after exit. Appropriate supplemental data may be entered as:

- Employment Follow-up for the appropriate post month(s). (see supplemental employment follow-up chart).

### **Younger Youth Diploma/GED Attainment**

Individuals listed are those who exited without a high school diploma or GED and do not have an Attained Diploma or Attained GED Equivalency service posted on MOSES **within one quarter of their exit**. Appropriate supplemental data may be entered as:

- General Service, Outcome/Enhancement, Attained HS Diploma
- General Service, Outcome/Enhancement, Attained GED/HS Equivalency

### **Younger Youth Retention**

Individuals listed are those who were exited during the quarter, but are not recorded as having been retained in either employment or education in the 3rd quarter after exit. Where appropriate, supplemental data may be added by entering:

- Employment Follow-up for the appropriate post month. (see supplemental employment follow-up chart); *or*
- Retention, Month 7 - 9 service.

### **Youth Attainment of Degree or Certificate**

Individuals listed are those who were exited during the quarter, but are not recorded as having attained a degree or certificate by the 3rd quarter after exit. Where appropriate, supplemental data may be added by entering:

- General Service, Outcome/Enhancement, Attained HS Diploma *or*
- General Service, Outcome/Enhancement, Attained GED/HS Equivalency *or*
- General Service Outcome/Enhancement, Attained Certificate, License or Degree.

### **Youth Placement in Employment/Education**

Individuals listed are those who were exited during the quarter, but are not recorded as having been placed in education or employment. Where appropriate, supplemental data may be added by entering:

- Employment Follow-up for the appropriate post month. (see supplemental employment follow-up chart); *and/or*
- General Service of Education Retention, Month 1 – 3.

**DENOMINATOR AND NUMERATOR COLUMNS  
BY MEASURE IN  
TITLE I QUARTERLY PERFORMANCE CHARTS**

<b>Chart No.</b>	<b>Performance Measure</b>	<b>Denominator Column</b>	<b>Numerator Column</b>
1	Adult Entered Employment Rate	E	H
2	Adult Credential & Employment Rate	C	H
3	Adult Retention Rate	E	H
5	Dislocated Worker Entered Employment Rate	E	H
6	Dislocated Worker Credential & Employment Rate	C	H
7	Dislocated Worker Retention Rate	E	H
9	Older Youth Entered Employment Rate	E	H
10	Older Youth Credential & Employment/Education Rate	B	H
11	Older Youth Retention Rate	E	H
14	Younger Youth Diploma/GED Attainment Rate	E	F
15	Younger Youth Retention Rate	E	H
16	Youth Attainment of Degree/Certificate	E	F
17	Youth Placement in Employment/Education	E	H

## SAMPLE - PERFORMANCE REVIEW LIST - SAMPLE

### Adult Entered Employment Rate for Boston Period Ending 09/30/2004

#### Participants Not Counted in Numerator

<u>App ID</u>	<u>Name</u>	<u>Phone</u>	<u>Title I Exit</u>	<u>Empl At Exit</u>	<u>Educ At Exit</u>	<u>Crdentl</u>	<u>Empl Qtr1</u>	<u>Empl Qtr 3</u>	<u>Educ Qtr 1</u>	<u>Last Foll/Up Status</u>	<u>Email Address</u>
10393870	AXXXXXX, VIVIAN	(617) 298-9999	11/05/2003	Yes		Yes					VIVIAN@aol.com
10458828	BXXXXXX, ELAINE	(617) 445-9999	11/21/2003	Yes		Yes				Unemployed	Elaine@aol.com
10460953	DXXXXXX, JOYCE	(617) 416-9999	10/10/2003	Yes		Yes					JOYCE@aol.com
10421864	TXXXXXX, XAU	(617) 524-9999	10/31/2003	Yes							XAU@aol.com
10524824	WXXXXXX, YUNG TAI	(617) 327-9999	10/15/2003	Yes		Yes					YUNG@aol.com

**Not Found in Numerator:**        5  
**Count in Denominator:**       23  
**Count in Numerator:**         18  
**Current Rate:**                 78.3%

**Notes:** For Entered Employment Rate and Credential Rate, the 1st quarter after exit applies. For Retention Rate, the 2<sup>nd</sup> and 3rd quarter after exit applies.

**SUPPLEMENTAL EMPLOYMENT DATA CHART**

			1st Qtr After Exit			2nd Qtr after exit			3rd Qtr after Exit		
<b>January</b>	<b>February</b>	<b>March</b>	April	May	June	July	August	September	October	November	December
exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10	11
	exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10
		exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>
<b>April</b>	<b>May</b>	<b>June</b>	July	August	September	October	November	December	January	February	March
exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10	11
	exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10
		exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>
<b>July</b>	<b>August</b>	<b>September</b>	October	November	December	January	February	March	April	May	June
exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10	11
	exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10
		exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>
<b>October</b>	<b>November</b>	<b>December</b>	January	February	March	April	May	June	July	August	September
exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10	11
	exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>	10
		exit	1	2	<b>3</b>	4	5	<b>6</b>	7	8	<b>9</b>

**Notes:** For Entered Employment Rate and Credential Rate, the 1st quarter after exit applies. For Retention Rate, the 2<sup>nd</sup> and 3rd quarter after exit applies.