

Fresno Regional Workforce Investment Board

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OPERATIONAL DIRECTIVE

FRWIB OD # 08-12

Date Released: May 8, 2012

To: All Fresno Regional Workforce Investment Board Providers of Services

From: Blake Konczal, Executive Director

Effective Date: May 8, 2012

Subject: Business Account Specialist Reports

Applicable Program: Adult, Dislocated Worker

The purpose of this OD is to instruct provider of services of the availability and use of several Business Account Specialist (BAS) reports.

Currently there are 4 reports to assist providers of services staff in managing BAS caseloads. These reports can be found in Crystal Reports under JTA and then BAS Job Seeker.

The reports are:

Active Customer – This report lists non-exited (active) job seekers by BAS. This report shows ALL active job seekers regardless of their job ready status. This report can be used to forecast future BAS caseload/assignments. This report can be run as a detail or summary. The summary report shows total counts without job seeker information.

Adult DW Active Job Readiness - This report lists non-exited (active) job seekers who are in an open code 11 (Job Ready) by BAS. This report is used to manage the number of job seekers assigned to an individual BAS. This report will also identify job seekers who are not assigned to a BAS by showing them grouped with a “blank” BAS name. This report can be run as a detail or summary. The summary report shows total counts without job seeker information. This report shows adult and dislocated worker enrollments only.

Active Customer Job Referrals – This report lists by location, by BAS, each job seeker’s job referrals for the selected date range. The job referrals are pulled from the electronic IEP section 16, Job Referrals. The report lists for each job referral: company name, referral date, job title and interview date. Additionally, the report lists the job seeker’s name, primary employment goal and code 11 status information. This report should be used to compare the job titles of the job referrals to the primary employment goal, as BASs should be referring job seekers to jobs that align with their employment goal.

Job Seeker Placement – This report lists by location, by BAS, each job seeker who was placed at exit for the selected date range. The report lists for each job seeker placement data including: company name and job title. Additionally, the report lists the job seeker’s primary employment goal. This report should be used to compare the job titles of the placements to the primary employment goal. This report shows ALL placed job seekers regardless of their job ready status.

If you have any questions, please contact the FRWIB Information Systems Division.