

WIAB 02-02

DATE: March 25, 2003
TO: All Local Workforce Investment Areas
FROM: Cheryl A. Brush, Chief, Workforce Systems Bureau
SUBJECT: Participant Obligation Report

I am pleased to introduce the new WIA participant Obligation Report! This report was developed to replace the multitude of obligational tracking systems currently utilized by WIA Subrecipients throughout the State. The Obligation Report is multifunctional in that it has the ability to generate a report and link to various screens for entry of data displayed on the report. It provides a means to plan and enter current and next year obligations for each participant and also displays expenditures paid and accrued. It contains other pertinent participation data as well.

Once initial data entry of obligational data is complete, the Obligation Report will be beneficial to WIA staff at all levels and will also be a useful tool for providing participant obligation information for federal reports and inquiries.

To allow for optimum utility, please ensure WIA Subrecipient staff data enter the appropriate obligational data in the Obligation Report within 30 days of the date of this WIA Bulletin (WIAB). Please note that our contractor, Justin Alderson, will be incorporating enhancements to the Obligation Report periodically in the future as he completes them. Future enhancements will include: a summary, in the aggregate, for post program supportive services (activity 99) and the ability to plan/enter current program year obligations; display of participant contract budget information, number of participants to serve, and remaining unobligated funds.

To assist in the development of this project, help was solicited from State, Region III Administrative Entity, and WIA Subrecipient staff to identify tracking systems currently utilized and the necessary information to develop an obligation tracking system that will be efficient and useful for everyone. For their invaluable innovative ideas, expertise, and patience in this project, I would like to thank: Alane Watkins, Beth Hogan, Brian Langley, Dania Rivers, Destinee Schuster, Jerry Riley, Marsha Harman, and Robin Dyck.

General Information About the Obligation Report:

- The Obligation Report is designed for the planning of current program year information. At the close of each program year, prior program year obligation amounts are deleted by our programmer (usually some time after mid-July), so by design, this report is not meant to display prior program year information.
- Please be patient! This report obtains data from several different sources. Consequently, it takes longer to generate than some of our other WIA reports.
- Underlined menu options and report headers are links that display a Help screen, highlighting that particular item's definition. To exit the Help screen, either click on the "X" in the upper right hand corner, or click on File, then Close.

To access the Obligation Report:

- Log in to the WIA Management Information System by entering your Username and Password
- Click on Reports
- Click on Obligation Reports

To Generate an Obligation Report:

- In the WIA Obligation Reports menu, enter the desired menu selections
- Click on the Submit Request Button

Obligation Report Tips:

- On the WIA Obligation Reports menu, the Program Year defaults to the current program year, and the Report field defaults to “Obligations”. You do not need to select from every field in the menu to get the desired report results. For example, to generate an Obligation Report that lists all participants by case manager (whose name was selected as the case manager in the participant activity screen), enter the first initial of the case manager’s first name and the first 7 digits of the case manager’s last name (no spaces). Unless the case manager has worked for multiple WIA Subrecipients, there is no need to enter the Program, WIB Number, Site, or Project. Next, click on the Submit Request button.
- While in the Obligation Report or the Detail screen, you will see “New Report” in the upper left hand corner. If you click on it, it will take you back to the Obligations Report menu.
- After your report has been generated, to see a particular participant’s “detail”, click on the participant’s name.
- To select the participant to navigate to other screens or reports in the WIA Management Information System, click on the participant’s social security number.

Participant Detail screen:

- In addition to “New Report”, you will also see “Obligation Report” in the upper left hand corner. If you click on it, it will take you back to the Obligation Report as previously generated.
- Selecting the Activity Obligation header (underlined), will take you to the Change Activity List and is the first step in changing the obligation amount for a specific activity. Next, click on the social security number that corresponds to the desired activity to navigate to the appropriate Activity screen. Lastly, change the activity obligation and click on the Submit Form button. We are planning to have the ability to link directly to a particular Activity screen or to have the ability of changing it directly in the Detail screen in the future. Our contractor and WIA programmer will need to research this further to see if this is even a possibility.
- To enter the total current year or next program year obligation amount, enter the amount in the correct field under Projected Obligation Data Entry. Region 3 Subrecipient staff are required to enter “Life” obligations for each WIA participant, which is the total amount of WIA funds to be expended on each participant for the duration of WIA participation. Once the amount(s) is entered, click on the Submit Plan button. To see the results in the Obligation Report, click on the Obligation Report link (underlined) in the upper left hand corner.

Action Requested:

- Data enter Program Year 2002 and 2003 projected obligation amounts within 30 days of the date of this WIAB.

Contacts:

If you have any questions regarding the Obligation Report, please feel free to call or e-mail Jeanie Irvine at 208-332-3570, extension 3323 or jjrvine@jobservice.us.