

# Ohio TechNet Data Sharing Brief

### The Challenge

More than 3,900 Ohioans in FY 2017 were covered by a certified Trade Adjustment Assistance (TAA) petition. Further, \$12,829,450 was allocated to Ohio to support training for TAA-affected workers in FY 2017. However, the State of Ohio has faced challenges in tracking the use of funding for TAA-affected workers.

### **Proposed Solution**

To address the challenge outlined above and meet reporting requirements for the Trade Adjustment Assistance Community College and Career Training (TAACCCT) grant program, Lorain County Community College (LCCC) – on behalf of Ohio TechNet (OTN) – sought to secure data sharing agreements (DSAs) with the Ohio Department of Job and Family Services (ODJFS) and partnering institutions to leverage the Ohio Workforce Case Management System (OWCMS).

OWCMS is a statewide data management system used to track individuals that utilize workforce services offered through the State. As a result, all individuals that utilize OhioMeansJobs Centers to receive employment and training services are included in the OWCMS system. With the agreements noted above, LCCC aimed to accomplish the following:

- Enter OTN participant data into OWCMS securely, and in adherence with The Family Educational Rights and Privacy Act (FERPA) and TAACCCT policy.
- Share program data of OTN participants with State of Ohio, in efforts to improve state reporting of TAA, veteran, and employment/wage metrics.
- Export OTN participant data from OWCMS for TAACCCT reporting and continuous improvement purposes.

## **Steps to Implementation**

The following steps were taken to meet the goals stated above.

- Executed DSA with Ohio State University (lead for Ohio TechNet Impact evaluation) and partnering higher education institutions, which established data sharing guidelines necessary for research and evaluation of the TAACCCT grant.
- Executed DSA amendments with partnering higher education institutions, which clarified: roles, definitions, data transmission schedule, use of data, and description of requested data. Most prominently, clarifications allowed LCCC to enter participant data into OWCMS.

<sup>&</sup>lt;sup>1</sup> Trade Activity Participant Report Data for FY 2017 for Ohio https://www.doleta.gov/tradeact/TAPR 2016.cfm?state=OH

- Executed DSA with ODJFS, with a goal of access and use of OWCMS data. DSA ultimately allowed ODJFS to provide LCCC with participant data that was entered by LCCC into OWCMS.
- Worked with ODJFS to determine methodology of data exports.
- Established Special Grant Office within OWCMS system.
- Identified users of Special Grant Office, and participated in training with Lorain County Workforce Development Agency to become familiarized with OWCMS.
- Drafted entry guide to assist users in entering Ohio TechNet data into OWCMS system.

#### **Barriers to Full Implementation**

Despite the efforts outlined above, LCCC (on behalf of OTN) was unable to utilize OWCMS as intended. The following were primary barriers to implementation.

- Execution of DSA with ODJFS was substantially delayed, occurring in 2017. An alternative data reporting procedure had been developed at this point in the OTN project, which launched in 2014.
- Executed DSA with ODJFS limited use of data. DSA limited data available to be extracted to solely data that was input by LCCC. Therefore, LCCC was unable to use information that would be acquired from OWCMS for TAACCT reporting purposes. Further, ODJFS' interest in utilizing OTN data to assist in reporting of TAA, veteran, and employment/wage metrics waned.
- Technical issues in system use arose. Special grant users were unable to add services to records
  of individuals within the system. This step is integral to record retention. The Lorain County
  Workforce Development Agency Director advised that OWCMS purges records that do not have
  a service entered 90 days after creation. Despite numerous attempts to correct, this technical
  issue was not resolved.

## **Next Steps**

The Ohio Department of Higher Education has recognized Ohio TechNet's data for students in manufacturing training programs as quality compared to other available data, primarily due to its inclusion of students in noncredit programs. To improve and expand upon this data set, LCCC (on behalf of OTN) has consulted with experts and researched best practices demonstrated in performance reporting. As a result, OTN hopes to modify existing DSAs with partnering institutions and develop DSAs with new higher education partners. Further, application of best practices will be pursued as new opportunities are sought and use of National Student Clearinghouse will be considered.

## **Appendix A: DRAFT OWCMS Entry Guide**

### DRAFT Ohio Workforce Case Management System (OWCMS) Entry Guide

#### **Table of Contents**

[Insert Table of Contents using References tab]

#### **Overview**

OWCMS is a statewide data management system used to track individuals that utilize workforce services offered through the State. As a result, all individuals that utilize OhioMeansJobs Centers to receive employment and training services are included in the OWCMS system. Through OTN, we hope to leverage this system to compare data gathered by partner colleges to data entered in the system.

This document is intended to provide guidance to OTN Data Specialist(s) entering data from Participant Intake Forms or Data Templates onto OWCMS.

#### Note:

- Italicized text represents an entry field or button.
- **Bold text** represents fields where responses are required.
- <u>Underlined text</u> indicates that a field should be checked to note any differences in data. Differences in data will be captured on Data Inconsistency Notification Form. This is included as an appendix.
  - If a field is pre-filled, leave as is. Capture any differences indicated from data template, on Data Inconsistency Notification Form.

## **Logging In**

- 1. Go to the following URL: <a href="https://owcms.ohio.gov/wcms/logon.xhtml">https://owcms.ohio.gov/wcms/logon.xhtml</a>
- 2. Enter *User Name* and *Password*. Recall that User Name will be "Last\_NameXXXX", with X's representing the last four digits of your Social Security Number (SSN).
- 3. A pop up box will appear after you log in. Highlight *OTN-TAA-Lorain* and Select *OK*.

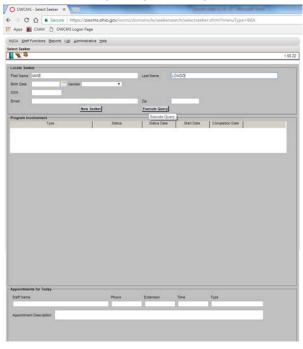


### **Entering a Participant into the Special Grant Office**

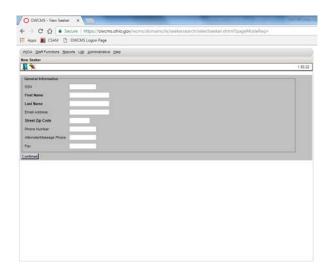
1. Go to the WIOA dropdown in the top left corner, and select Select Job Seeker.



2. Enter First Name and Last Name for participant, and press Execute Query.



- 3. After you execute the query, there are two scenarios: a) the participant is already entered in OWCMS system OR b) the participant is not in the OWCMS system and a new record will have to be created. Guidance on each option is listed below.
  - a) If a new record will have to be created, no results will appear. Select *Create New Seeker* and *enter First Name*, *Last Name*, and *Street Zip Code*.



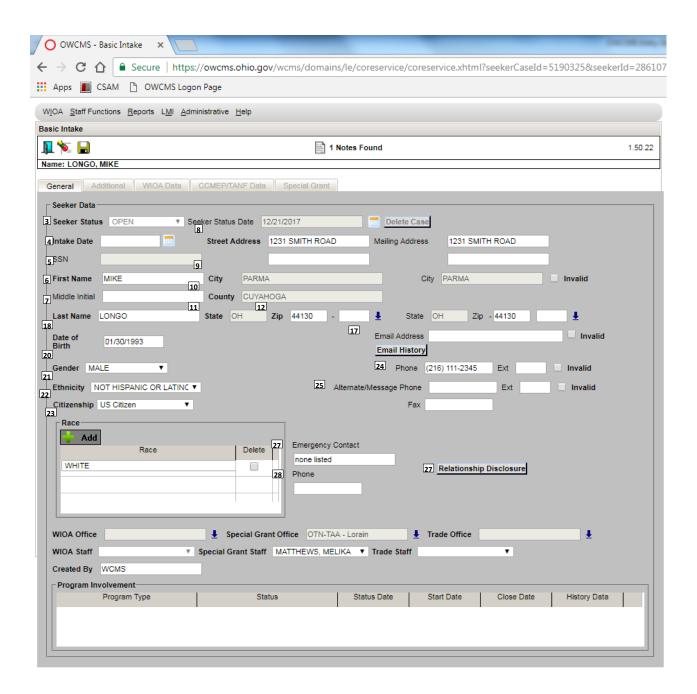
b) If a participant is in the system, results will appear. Compare SSN, Veteran Status, Birth Date, Email Address, and Street Address displayed with information on Intake Form template. If consistency is significant, select this record by pressing the rectangle on the far left side of the row.

A pop up message may appear that states that you will have to create a new record – click *OK*.



#### **Basic Intake: General**

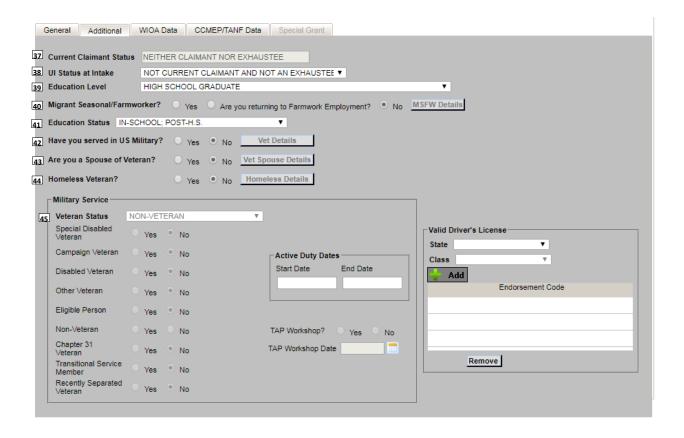
After participant is selected OR new record is created, you will be brought to the *Basic Intake* page in the *General* tab.



# **Basic Intake: General - Entry Directions**

OWCMS FIELD LABEL	OWCMS FIELD	ENTRY DIRECTIONS	
1.	Seeker Status	This field is automated, and should show as OPEN.	
2.	Seeker Status Date	This field is automated, and should reflect date that participant is entered into OWCMS.	
3.	Intake Date	Enter <i>Date</i> listed on Participant Intake Form (PIF).	
4.	SSN	Enter Social Security # listed on PIF.	
5.	First Name	Enter First Name listed on PIF.	
6.	Middle Initial	Enter Middle Initial listed on PIF.	
7.	Last Name	Enter Last Name listed on PIF.	
8.	Street Address	Enter Address listed on PIF.	
9.	City	Enter City listed on PIF.	
10.	County	This field is automated.	
11.	State	Enter State listed on PIF	
12.	Zip	Enter Zip Code listed on PIF.	
13.	Mailing Address	This field should be left blank.	
14.	City	This field should be left blank.	
15.	State	This field should be left blank.	
16.	Zip	This field should be left blank.	
17.	Email Address	Enter <i>Email Address</i> listed on PIF.	
18.	Date of Birth	Enter <i>Date of Birth</i> listed on PIF.	
19.	Age	This field is automated.	
20.	Gender	Select <i>Gender</i> listed on PIF.	
21.	Ethnicity	Select Ethnicity listed on PIF	
22.	Native or Primary Language	Select English.	
23.	Race	Select every <i>Race</i> checked on PIF.	
24.	Phone	Enter Cell Phone listed on PIF.	
25.	Alternative/Message Phone	Enter Home Phone listed on PIF.	
26.	Fax	This field should be left blank.	
27.	Emergency Contact	Enter Alternate Contact Name/Relation listed on PIF, separated by a dash.  (e.g. Enter Sue Smith – mother)	
28.	Phone (of Emergency Contact)	Enter Alt. Contact Phone listed on PIF.	
29.	WIA Office	This field is automated.	
30.	WIA Staff	This field is automated.	
31.	Created By	This field is automated.	
32.	Special Grant Office	This field is automated.	
33.	Special Grant Staff	This field is automated.	
34.	Trade Office	This field is automated.	
35.	Trade Staff	This field is automated.	
36.	Program Involvement	This field is automated.	

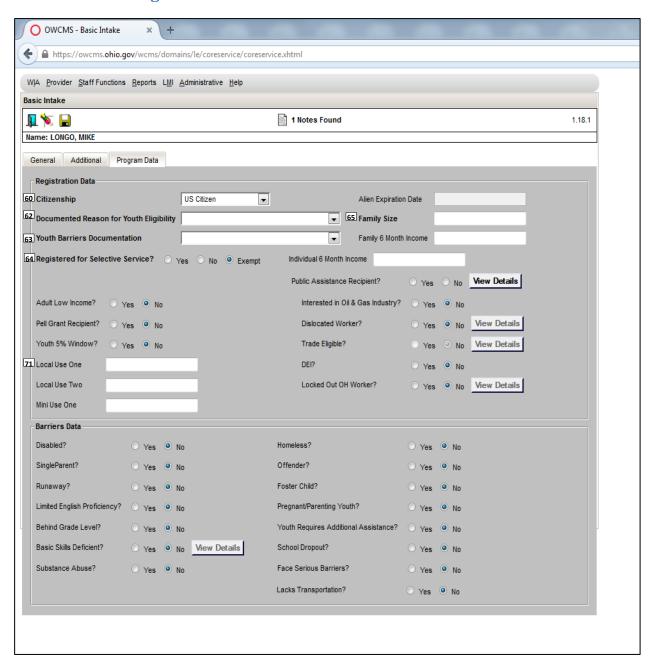
#### Basic Intake: Additional - Screen Print



# **Basic Intake: Additional - Entry Directions**

OWCMS FIELD LABEL	OWCMS FIELD	ENTRY DIRECTIONS		
37.	Current Claimant Status	This field is automated.		
38.	UI Status at Intake	Select Not Current Claimant and Not Exhaustee.		
39.	Education Level	<ul> <li>Select Highest Level of Educational Attainment checked on PIF.</li> <li>If Some College is selected on PIF, select 1 year of College.</li> <li>When nothing was select High School Graduate was selected.</li> </ul>		
40.	Migrant Seasonal/Farmworker?	Select No.		
41.	Education Status	Select In School, Post HS.		
42.	Have you served in US Military?	<ul> <li>Select No.</li> <li>This is a default response, even if Veteran eligibility is indicated on PIF.</li> </ul>		
43.	Are you a Spouse of a Veteran?	<ul> <li>Select No.</li> <li>This is a default response, even if Veteran eligibility is indicated on PIF.</li> </ul>		
44.	Are you Homeless?	Select No.		
45.	Veteran Status	<ul> <li>Select NON-VETERAN.</li> <li>This is a default response, even if Veteran eligibility is indicated on PIF.</li> </ul>		
46.	Special Disabled Veteran	This field is automated, and will show a response of No.		
47.	Campaign Veteran	This field is automated, and will show a response of <i>No</i> .		
48.	Disabled Veteran	This field is automated, and will show a response of <i>No</i> .		
49.	Other Veteran	This field is automated, and will show a response of <i>No</i> .		
50.	Eligible Person	This field is automated, and will show a response of <i>No</i> .		
51.	Non-Veteran	This field is automated, and will show a response of <i>No</i> .		
52.	Chapter 31 Veteran	This field is automated, and will show a response of <i>No</i> .		
53.	Transitional Service Member	This field is automated, and will show a response of <i>No</i> .		
54.	Recently Separated Veteran	This field is automated, and will show a response of <i>No</i> .		
55.	Active Duty Dates – Start Date	<ul> <li>This field should be left blank.</li> <li>This is a default response, even if Veteran eligibility is indicated on PIF.</li> </ul>		
56.	Active Duty Dates – End Date	<ul> <li>This field should be left blank.</li> <li>This is a default response, even if Veteran eligibility is indicated on PIF.</li> </ul>		
57.	Valid Driver's License - State	Do not make a selection. This field will remain as-is.  OR  Select <i>None</i> .		
58.	Valid Driver's License - Class	Do not make a selection. This field will remain as-is.		
59.	Endorsement Code	This field should be left blank.		

### Basic Intake: Program Data - Screen Print



# **Basic Intake: Program Data - Entry Directions**

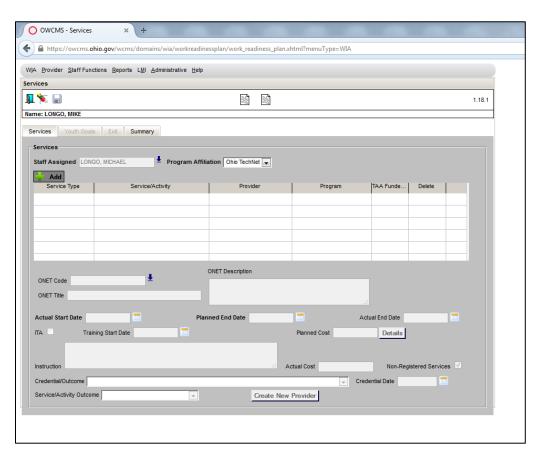
OWCMS FIELD LABEL	OWCMS FIELD	ENTRY DIRECTIONS	
60.	Citizenship	Select <i>US Citizen</i> if US Citizenship is indicated on PIF.	
61.	Alien Expiration Date	This field should be left blank.	
62.	<ul> <li>Documented Reason for Youth</li> <li>Eligibility</li> <li>This field is only required for participants 24 years old, and under.</li> </ul>	Select None.	
63.	<ul> <li>Youth Barriers Documentation</li> <li>This field is only required for participants 24 years old, and under.</li> </ul>	Select <i>None</i> .	
64.	Registered for Selective Service	Select Exempt.	
65.	Family Size	Enter 1.	
66.	Family 6 Month Income	This field should be left blank.	
67.	Individual 6 Month Income	This field should be left blank.	
68.	Adult Low Income?	Do not make a selection. This field will remain as-is.	
69.	Pell Grant Recipient?	Do not make a selection. This field will remain as-is.	
70.	Youth 5% Window?	Do not make a selection. This field will remain as-is.	
71.	<ul> <li>Field entries for local use fields should be separated by commas:</li> <li>[Student ID #], [Veteran Status], [Disability Status], [Pell Grant Eligibility], [TAA Benefit Eligibility]         Example entry: 123456, NonVet, NonDis, Pell, TAA</li> <li>If field is already in use, enter data into Local Use Two.</li> </ul>	<ul> <li>a) Enter Student ID # listed on PIF</li> <li>b) Enter Eligibility for Veteran Status listed on PIF.  <ul> <li>If this field was checked on PIF, enter Vet.</li> <li>If this field was not checked on PIF, enter NonVet.</li> </ul> </li> <li>c) Enter Disability Status listed on PIF.  <ul> <li>If this field was checked on PIF, enter Dis.</li> <li>If this field was not checked on PIF, enter NonDis.</li> </ul> </li> <li>d) Enter Pell Grant Eligibility listed on PIF.  <ul> <li>If this field was checked on PIF, enter Pell.</li> <li>If this field was not checked on PIF, enter NoPell.</li> </ul> </li> <li>e) Enter TAA Benefit Eligibility listed on PIF.  <ul> <li>If this field was checked on PIF, enter TAA.</li> <li>If this field was not checked on PIF,</li> </ul> </li> </ul>	

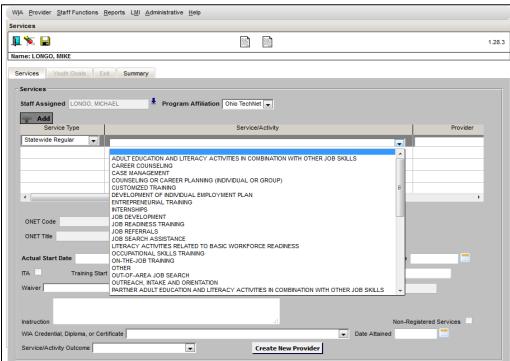
### enter NonTAA.

- f) Enter OTN ID listed on PIF template.
- g) Enter School, using codes listed on PIF template.

		template.
72.	Local Use Two	This field should be left blank
73.	Mini Use One	This field should be left blank
74.	Public Assistance Recipient?	Do not make a selection. This field will remain as-is.
75.	Interested in Oil & Gas Industry?	Do not make a selection. This field will remain as-is.
76.	Dislocated Worker?	No selection should be made. This field will remain asis.
77.	<u>Trade Eligible?</u>	<ul> <li>Do not make a selection. This field will remain as-is.</li> <li>If PIF indicates TAA eligibility, but Yes is not selected, local WIB should be informed.</li> </ul>
78.	DEI?	Do not make a selection. This field will remain as-is.
79.	Locked Out OH Worker?	Do not make a selection. This field will remain as-is.
80.	<u>Disabled?</u>	<ul> <li>Do not make a selection. This field will remain as-is.</li> <li>If PIF indicates that participant is disabled, but Yes is not selected, local WIB should be informed.</li> </ul>
81.	SingleParent?	Do not make a selection. This field will remain as-is.
82.	Runaway?	Do not make a selection. This field will remain as-is.
83.	Limited English Proficiency?	Do not make a selection. This field will remain as-is.
84.	Behind Grade Level?	Do not make a selection. This field will remain as-is.
85.	Basic Skills Deficient?	Do not make a selection. This field will remain as-is.
86.	Substance Abuse?	Do not make a selection. This field will remain as-is.
87.	Homeless?	Do not make a selection. This field will remain as-is.
88.	Offender?	Do not make a selection. This field will remain as-is.
89.	Foster Child?	Do not make a selection. This field will remain as-is.
90.	Pregnant/Parenting Youth?	Do not make a selection. This field will remain as-is.
91.	Youth Requires Additional	Do not make a selection. This field will remain as-is.
	Assistance?	
92.	School Dropout?	Do not make a selection. This field will remain as-is.
92. 93.		Do not make a selection. This field will remain as-is.  Do not make a selection. This field will remain as-is.  Do not make a selection. This field will remain as-is.

#### **Services - Screen Prints**

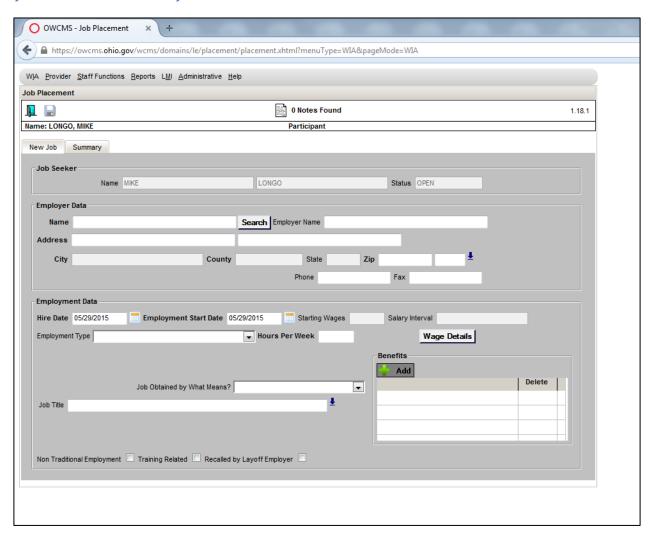




# **Services - Entry Directions**

OWCMS FIELD LABEL	OWCMS FIELD	ENTRY DIRECTIONS	
95.	Staff Assigned	This field is automated.	
96.	Program Affiliation	This field is automated. <i>Ohio TechNet</i> should be selected.	
97.	Service Type	Select Statewide Regular	
98.	Service/Activity	Select CC Skills Training.	
99.	Provider	Select College Name listed on PIF.	
100.	Program	This field should be left blank.	
101.	TAA Funded? Yes/No	Do not make any selections in this field.	
102.	Delete	Do not make any selections in this field.	
103.	ONET Code	Enter ONET Code associated with Grant-Affected Program listed on PIF.	
104.	ONET Title	This field is automated.	
105.	ONET Description	This field is automated.	
106.	Actual Start Date	<ul><li>Enter First Semester as Participant listed on PIF.</li><li>For Fall 2015, enter 8/1/2015</li></ul>	
107.	Planned End Date	Enter date based upon program length.  • For Fall 2015, enter 8/1/2015	
108.	Actual End Date	Enter date participant completes program.	
109.	ITA	This field should be left blank.	
110.	Training Start Date	This field should be left blank.	
111.	Instruction	Enter program information.	
112.	Planned Cost	This field should be left blank.	
113.	Actual Cost	This field should be left blank.	
114.	Credential/Outcome	This field should be left blank.	
115.	Credential Date	This field should be left blank.	
116.	Non-Registered Services	This field should be left blank.	
117.	Service/Activity Outcome	This field should be left blank.	

## Job Placement: New Job - Screen Print



# Job Placement: New Job - Entry Directions

This screen is used to record new employment of participants.

Additional guidance is needed to complete Entry Directions.

OWCMS Field Label	OWCMS Field	Entry Directions	
118.	Job Seeker – Name	This field is automated.	
119.	Job Seeker – Status	This field is automated.	
120.	Name		
121.	Employer Name		
122.	Address		
123.	City		
124.	County		
125.	State		
126.	Zip		
127.	Phone	This field should be left blank.	
128.	Fax	This field should be left blank.	
129.	Hire Date		
130.	Employment Start Date		
131.	Starting Wages		
132.	Salary Interval		
133.	Employment Type		
134.	Hours Per Week		
135.	Job Obtained by What Means?		
136.	Job Title		
137.	Benefits	This field should be left blank.	
138.	Non Traditional Employment		
139.	Training Related		
140.	Recalled by Layoff Employer		

# **Appendix A: Data Inconsistency Notification Form**

## **DATA INCONSISTENCY NOTIFICATION FORM**

Ohio TechNet Participant Name				
Information Listed on Ohio Tech	nNet Participant I	ntake Form (PIF)		
Address				
City	State		Zip Code	
Home Phone		Cell Phone		
Email Address				
Highest Level of Educational Attain	ment	Eligible for Vetera	an's Benefits	
Individual with a Disability		Eligible for Pell G	rant	
Eligible for TAA Benefits		Currently Employed?		
Hourly Wage		Hours/Week		
Information Listed in Ohio World	kforce Case Mana	agement System	(OWCMS)	
Address				
City	State		Zip Code	
Home Phone		Cell Phone		
Email Address:				
Highest Level of Educational Attainment		Eligible for Veteran's Benefits		
Individual with a Disability		Eligible for Pell Grant		

Currently Employed?		
Hours/Week		
Date		

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