

**NORTEC
POLICY STATEMENT
UNIVERSAL SERVICES/JOB CENTER VISITS REPORTING**

Effective Date: July 1, 2015

Last Updated: July 1, 2015

PURPOSE

The purpose of this policy is to provide guidelines to the Service Providers (NoRTEC Subcontractors) for the purposes of quarterly Universal Services/Job Center Visits reports. It is in the interest of the Workforce Development Board and Governing Board to be informed of the number of clients seeking universal services through the Job Centers, as well as the total number of clients served in each of NoRTEC's counties.

REPORTING FORMAT/DEFINITIONS

Job Center Visits reports shall contain cumulative data for the entire program year, beginning on July 1 and ending on June 30. Reports shall be submitted each quarter, five days after the end of the quarter¹:

- First Quarter (July 1-September 30) – Report due October 5
- Second Quarter (October 1-December 31) – Report due January 5
- Third Quarter (January 1-March 31) – Report due April 5
- Fourth Quarter (April 1-June 30) – Report due July 5

Attachment A contains a sample template of the report. Each quarter's report will contain a list of dates, the names of the clients that were served and a unique identifier for each client, beginning on July 1 of each program year through the end date of the quarter being reported. For example, a visitor in the second quarter will be included in the second, third and fourth quarterly reports.

Following are definitions associated with each of the required data elements contained in the report:

- 1. Date of Visit** – Each day the provider serves clients should be listed, once for each client served. If five clients are served on 7/1, that date will be listed five times, once for each client.
- 2. Name of Client** – Each **client served**, listed once each day. A client being served should be reported only once per day, even though the client may have received multiple services.
- 3. Unique Identifier** – Each client should use a unique identifier so that two clients with the same name can be differentiated. A unique identifier shall be selected and used by each service provider in the tracking system. Options include, but are not limited to:
 - Birth month and day (e.g., 0612 for June 12)
 - Last four digits of client's social security number
 - Last four digits of client's phone number

¹ If the due date of each quarterly report falls on a holiday or weekend, the report will be due by close of business on the next business day.

To assure consistency, once the unique identifier is chosen, it shall be collected for all clients tracked in the system.

MONITORING

Verification of the reporting of data elements and narrative information shall be reviewed by NoRTEC during on-site program monitoring and/or desk review.

POLICY EXCEPTIONS

Service Providers (NoRTEC Subcontractors) may make exceptions to this policy only with prior written authorization from the NoRTEC Administrative entity.

JOB CENTER VISITS REPORT

Service Provider: XXXXXXXX

Program Year: July 1, 20XX – June 30, 20XX

Date of Visit	Client Name	Client Unique Identifier
7/1/20XX	John Doe	0704
7/2/20XX	Jane Doe	1225
7/2/20XX	John Doe	0704