Search COE – Export Feature

Introduction

MSIN 6.0 has an "Export" button added to the Search COE screen. This allows the user to export a search results file in XML format (Excel readable) that contains more information than the search results displayed on the screen. The additional columns in the export file include move information and dates for the worker and child, SEA Reviewer name and verification date (if applicable) and other information that allows I&R staff to track their work. By manipulating the export file in Excel, users can create a variety of useful tables and graphs to monitor and improve I&R practices.
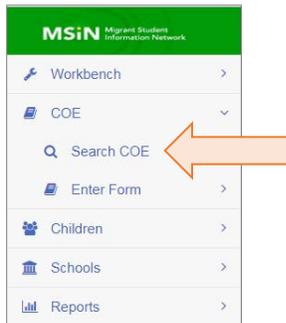
Exporting COE data

From the left side menu

Figure 1

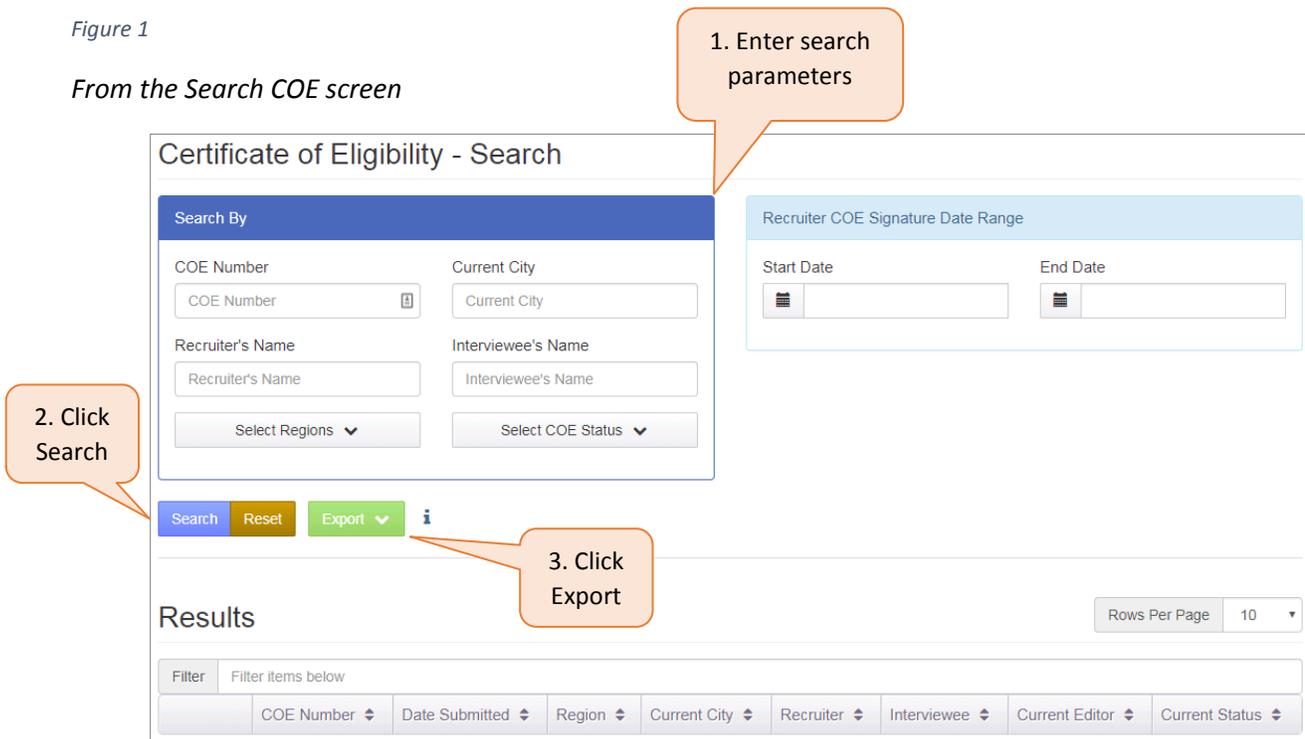*From the Search COE screen*

Figure 2

Description of steps shown in Figure 2:

1. From the "Search COE" screen, you can enter just the COE number, or you can enter parameters to narrow or widen your COE search, such as the recruiter's name, their region, the COE status, a date range when the recruiter signed the COE(s), etc.
2. After the desired parameters are entered, click the blue **Search** button to obtain results.
3. Once results are displayed on the screen, the green **Export** button will become available for use. Note that prior to clicking Search, the Export button was a light green color; it turns a dark green color only when a search has already been started and there are results available for export.
4. Click on **Export** button and select from the two available options: Export Excel or Export Excel with MSD Numbers.
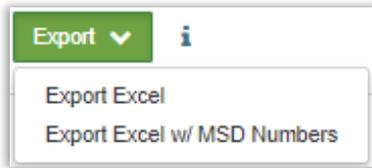
The exported files are in XML format (readable with Excel) and they have two workbook tabs along the bottom: Search Criteria and COE Search Results, as shown below.
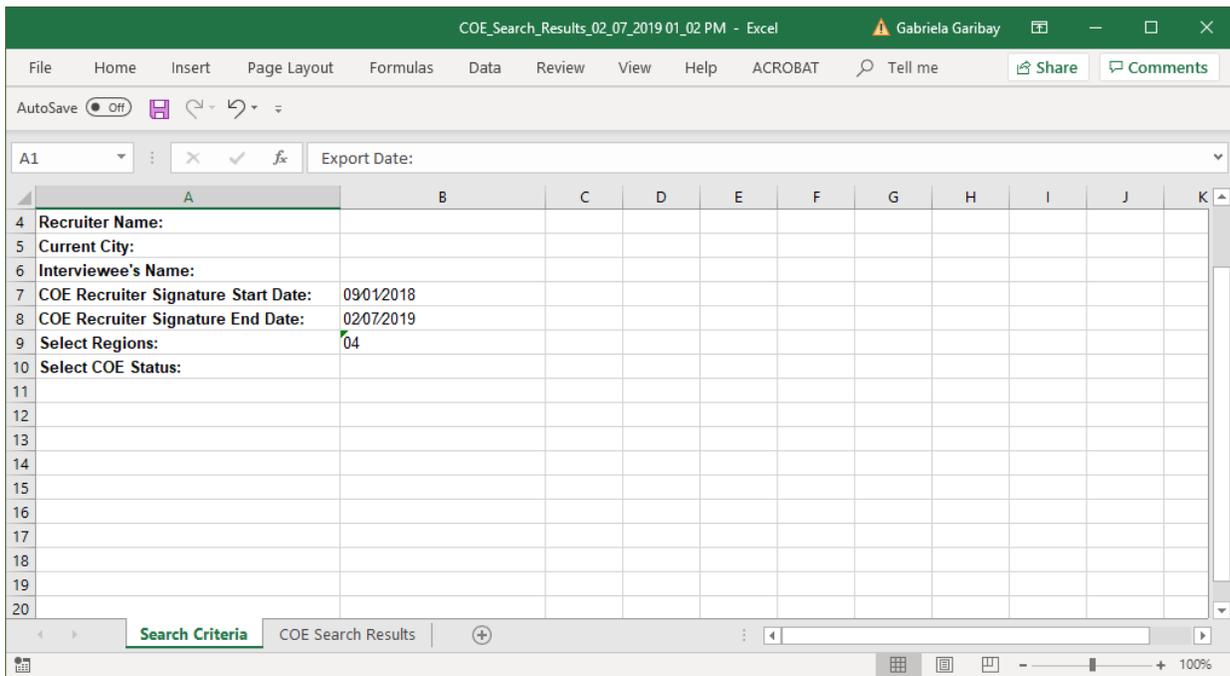
Figure 3

First Tab: Search Criteria

In this example, only 3 criteria were entered: recruiter signature start date (lower limit of date range), recruiter signature end date (upper limit of date range), and a region number. The results will include all COEs (all statuses) that have a recruiter signature (all recruiters in that region) in the provided date range.

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Second Tab: COE Search Results

This tab will include the same columns displayed on the results screen, in the same order, but will add many more columns of information from each COE. The default columns displayed on the screen also appear first in the export file worksheet.

Field	Description
COE Number	Number assigned by MSIN when an eCOE is synchronized with the database or when a paper COE is entered in MSIN using the Enter Form screen for COE 2017
Date Submitted	Date when an eCOE is synchronized to MSIN from a laptop or when a paper COE is entered into the system (the COE Number is assigned on this date)
Region	The name of the regional office or direct-funded district
Current City	This city comes from Current Address fields in Section V (Family Data) of the COE
Recruiter	Name of the recruiter who created the COE
Interviewee	Name of the person who provided the information that was recorded on the COE
Current Editor	Name of the person who is editing the COE at the moment, if applicable
Current Status	Indicates the COE status at the time the search is run (note that some statuses are not final and will therefore change, such as Creation to Review)

Because there are many COE statuses, it is helpful to think of them as falling under two general categories: 1) Work Pending (statuses that indicate someone is still working on the COE), and 2) Work Completed (statuses that indicate work has been completed on the COE).

Work Pending	Work Completed
Creation (recruiter working on COE)	**Completed: Approved**
Review (submitted to Reviewer queue)	**Completed: Denied** (never approved)
Second Reviewer (a second person is checking it)	**Completed: Voided** (due to system error); or **Voided** (marked as voided prior to approval)
My Data Entry + Review (the Data Specialist will also be the Reviewer of the COE)	**Completed: Child Removed** (after approval; due to Quality Control findings)
Fix COE(s) (returned to the Recruiter for corrections)	**Completed: COE Ineligible** (after approval; due to Quality Control findings)

In addition to the default columns in the search results screen and the variety of COE statuses listed above, the export file adds new columns, as follows:

Field	Description
Worker Moved From	From COE Section 1, item #4. The city, state, country from which the worker moved
Worker Moved To	From COE Section 1, item #4. The city and state (in the U.S.) to which the worker moved to establish him or herself as a Migratory Worker
Worker Moved Date	From COE Section 1, item #4, the date when the worker arrived in the "moved to" city

Field	Description
Qualifying Activity	From COE Section 1, item #5, the qualifying work (verb and noun) the worker did while living in the "moved to" city
Worker Is...	From COE Section 1, item 2b, the worker's relationship to the children listed on the COE in Section VI, Child Data
Employment Type	From COE Section 1, item 5a, the type of employment (seasonal or temporary) the worker engaged in soon after arriving in the "moved to" city
Child(ren) Moved From	From COE Section 1, item #1. The city, state, country from which the child(ren) and the Migratory Worker moved
Child(ren) Moved To	From COE Section 1, item #1. The city and state (in the U.S.) to which the child(ren) and the Migratory Worker moved to establish the child(ren) as Migratory Child(ren)
QAD	From COE Section 1, item #3, the Qualifying Arrival Date is when the child(ren) and the worker arrived in the "moved to" city (begins 3-year eligibility period)
Recruiter Sign Date	From COE Section XI, the date when the Recruiter signed the COE
Residency Date	From COE Section VI, the date when the children arrived at their current address
Verification Date	From COE Section XI, the date when the SEA Reviewer signed the COE
Verified By...	From COE Section XI, the name of the SEA Reviewer who signed the COE
COE Type	Indicates whether the COE is an eCOE or a Paper COE

The *Export Excel with MSD Numbers* file will contain the same information described above and an additional column including the MSD number for each child on the COE. If a COE contains more than one child, the report will include one row per child.

Field	Description
MSD Number	From COE Section VI, if available. If not on COE, then from child record in MSIN.

Note that some children will not have an MSD number. In such cases, this field displays a reason for the missing MSD number, as follows:

Reason	Description
Not Completed	The COE workflow has not been completed (e.g., in Creation, Review, FixCOE, etc.).
Ineligible	The COE was marked ineligible.
Voided	The COE was voided.
Denied	The COE was denied.
In Deduplication	The child record is in the de-duplication process.

Using the export file

The following examples show how users can leverage this export feature to track their I&R work and monitor I&R practices. Each example (using fictitious names and data) was created with simple tools in Excel to manipulate the XML file export and quickly transform it into usable information for various purposes.

Example 1: COEs by Recruiter and COE Status

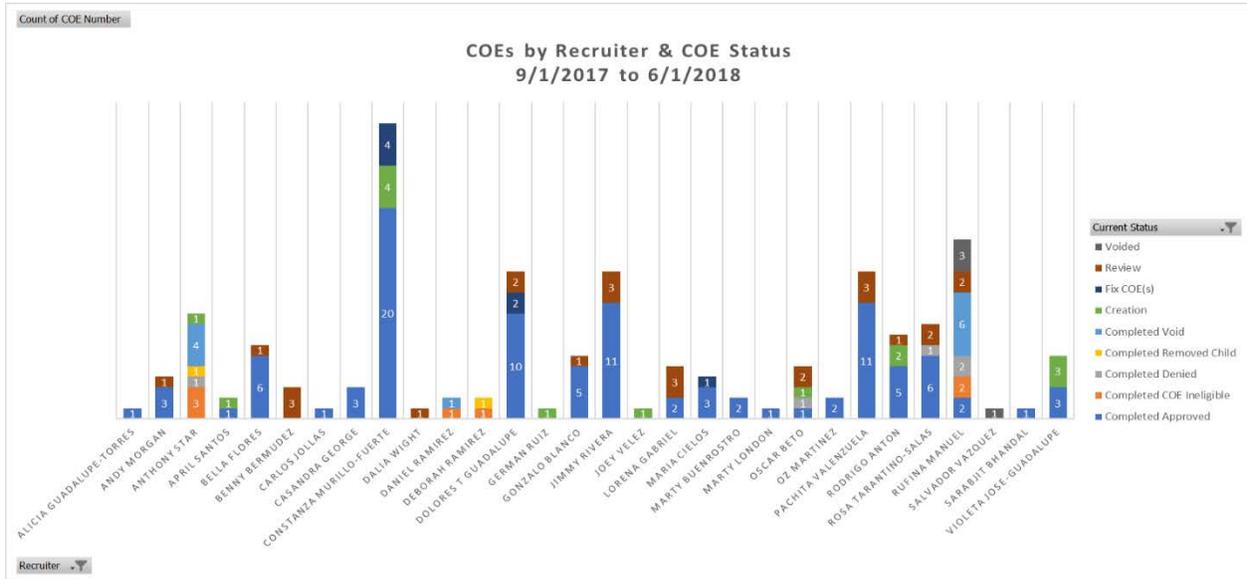This chart is a "snapshot" of the recruitment activity in a given date range.

Figure 4

This chart was created in Excel by selecting all fields in the COE Search Results tab and then inserting a pivot chart. The data elements selected were COE Number, Recruiter, and Current Status. If you are not familiar with pivot charts and pivot tables, there are many excellent tutorials online or a colleague can show you the basics in about 15 minutes. These are powerful tools that are well worth learning and using.

An I&R Coordinator or Supervisor can use a chart like this to quickly assess which recruiters need more support. For instance, although she has created a relatively high number of COE's compared to her peers, Rufina Manuel needs support because only 2 of her 17 COEs were "Completed: Approved." She may need support with technology in particular because 6 of her COEs were "Completed: Voided" and 3 more were "Voided," which indicates issues using the MSIN system. An I&R Coordinator could decide to pair Rufina with a more proficient recruiter, as evidenced by the COE data.

Ultimately, this information can be looked at in different ways to make informed decisions about a subgrantee's particular I&R needs and accomplishments.

Example 2: COEs with Extended Eligibility

The changes in child eligibility introduced in 2017 as a result of the Every Student Succeeds Act (ESSA) have significantly impacted recruitment practices. One positive side effect is that many children will have an extended eligibility period if they make a subsequent qualifying move with an established

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migratory worker. Using the Search COE export file, I&R staff can quickly calculate the positive impact of probing for subsequent moves while Recruiters interview families.

This table shows how a simple Excel formula (found easily by doing a Google search) can be used to compare two key dates and thereby determine how many days the child(ren)'s eligibility was extended.

H2	▼	:	× ✓	ƒₓ	=DATEDIF(D2,E2,"d")			

	A	B	C	D	E	F	G	H
1	COE Number	Worker Moved From	Worker Moved To	Worker Moved Date	QAD	Child(ren) Moved From	Child(ren) Moved To	Eligibility Extended (Days)
2	DD99091	SAN JOSE, California United	PARLIER, California Unite	06/28/2015	06/22/2017	PARLIER, California United St	SAN JOSE, California United	725
3	DD99095	SAN JOSE, California United	STOCKTON, California Un	06/11/2016	07/22/2017	STOCKTON, California United	SAN JOSE, California United	406
4	DD99037	REDWOOD CITY, California	Fresno, California United S	05/05/2016	08/12/2016	FRESNO, California United Sta	REDWOOD CITY, California U	99
5	DD99033	REDWOOD CITY, California	HOLLISTER, California Un	05/19/2017	08/17/2017	HOLLISTER, California United	REDWOOD CITY, California U	90
6	DD99106	San Jose, California United S	HOLLISTER, California Un	05/28/2016	08/09/2016	HOLLISTER, California United	San Jose, California United S	73
7	DD99107	San Jose, California United S	HOLLISTER, California Un	05/28/2016	08/09/2016	HOLLISTER, California United	San Jose, California United S	73
8	DD99124	Hayward, California United S	Tracy, California United St	06/16/2017	08/18/2017	Tracy, California United States	Hayward, California United St	63
9	DD99072	Livermore, California United S	Paso Robles, California Un	06/16/2017	08/16/2017	Paso Robles, California United	Livermore, California United S	61
10	DD99108	HAYWARD, California United	YUBA CITY, California Uni	06/20/2017	08/20/2017	YUBA CITY, California United	HAYWARD, California United	61
11	DD99076	Livermore, California United S	Lathrop, California United	06/15/2017	08/15/2017	Lathrop, California United State	Livermore, California United S	61

Figure 5

In this example, the user rearranged and deleted columns in order to focus on the Worker Moved Date (when the parent/guardian became a Migratory Worker) and the QAD (Qualifying Arrival Date, when the child(ren) met the definition of Migratory Child; also, the start of their 3-year eligibility period). Different dates indicate that the Recruiter probed for subsequent moves and recorded the most recent time the child(ren) made a qualifying move with (or to join/precede) the Migratory Worker. This is a highly recommended practice in California because it provides the child(ren) the longest possible eligibility period. By creating this report from the export file, local I&R staff can see the tangible benefit to children in terms of additional days they can receive Migrant Education Program services because of their thorough recruitment practices.

Note: This document is only a brief introduction to the Search COE export file. There are dozens of ways to manipulate the file and extract valuable monitoring and I&R planning information. Subgrantees are encouraged to share ideas as they develop new uses for the available data.