Introduction

This document was created by Utah's Department of Workforce Services (DWS). It describes the rationale, roles, and responsibilities of the gatekeeper position that the department created to serve as a liaison between policy and analytic staff when a data report request occurs. This can be used as a helpful example for any jurisdiction considering creating a similar role in their department.

What is a gatekeeper?

A person through which report requests, questions about reports, and report issues are communicated to the MIS team. Depending on the volume of report requests, this could be an individual's full-time job, or just a portion of someone's work. This is an important part of the gatekeeper's work and as such should be included on a performance plan and performance should be evaluated regularly. The gatekeeper is the key to a successful relationship between Operations and Workforce Research and Analysis (WRA) divisions.

Why are gatekeepers needed?

The Gatekeeper manages DWS' vision of "one source of the truth", ensuring that Legislative, Governor, Federal and policy/training definitions are consistent and correct. They also eliminate duplicate requests, control the flow of the report requests, understand data requests and data input/output, and convey reporting priorities for their respective divisions to WRA.

Roles of a gatekeeper

- **Gather report specs from division requesters and answer questions from MIS**
  - Requesters should provide detailed report specs to their gatekeeper
    - Time frames for data
    - Data needed by requesters providing the program/policy/system criteria and definitions needed by MIS to pull the report
    - Results Display such as data elements (IE: **details** - case number, PID, name, dates, etc. or **aggregate** – months, number of XX)
    - Negotiating due date with MIS
  - To the extent possible, gatekeepers use their understanding of the data to refine report specs (may need to ask requester questions) and manage requester expectations
    - It is important to know data input into the system app (IE: eREP, UWORKS, etc.) and their nuances (IE: required field, workers don't use, etc.)
  - The gatekeeper should be able to find answers to questions that MIS may have as work may not be able to move forward until answered.
    - *It is not MIS' role to make decisions for data requests, but to help understand what the data looks like and how it behaves.*
  - The gatekeeper will communicate the request to WRA through the proper MIS channel (Jira)

- **Communicate the reporting priorities of their division to MIS**
  - Information needed to determine priorities:
    - Name and title of requester
    - Deadline
    - Reason for deadline (IE: meeting, conference, etc.)
    - Mock-up of report showing how requester would like report to look when needed

WORKFORCE SERVICES RESEARCH & ANALYSIS

- Negotiate with WRA through the proper MIS channel to determine how divisional priorities will be met

- **Serve as a liaison between MIS and their respective division**
  - Communicate deadline issues back to the respective division after consulting with MIS
  - Coordinate the validation of results to ensure the data being requested is reflected in the report
  - Provide status updates to customers
  - Coordinate directly with MIS Manager on high profile reports (legislature, governor's office, EDO, or agency Directors) or reports with deadlines less than one week.
    - Or to address issues or concerns otherwise
  - Facilitate or support direct communication between MIS Manager/staff and report requestor when appropriate or beneficial to building relations between WRA and operations
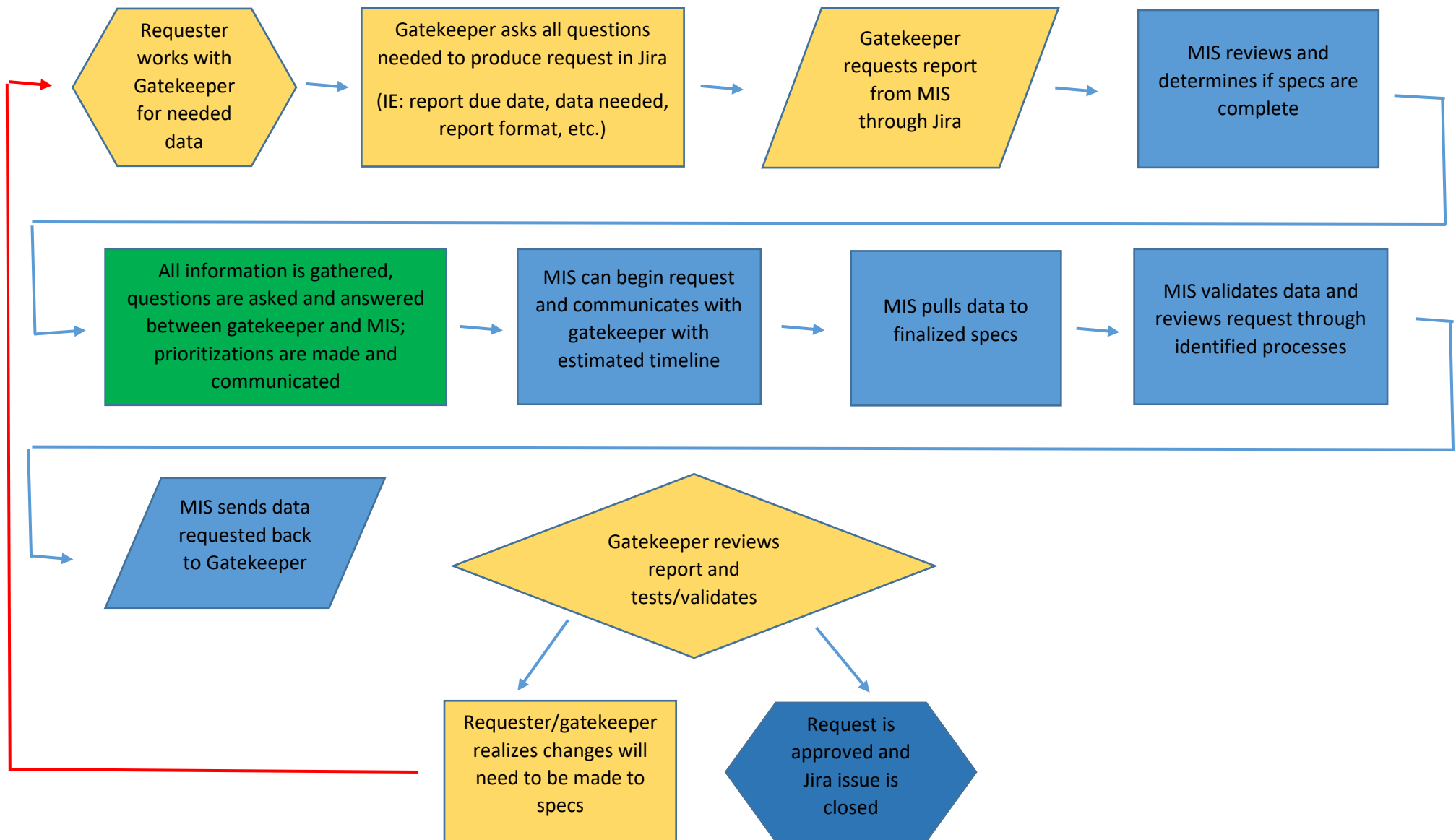
Important Guidelines

- Any requests from **media**, or where data is given to the public (including publishing on a website), first contact your Public Information Officer, before making a request from MIS.
- Any requests from external customers, should follow the guidelines set for Information and Records Requests
- All **media**, **external**, **Legislative** and Governor **requests** must include the MIS Managers in Jira or emails attached to the request, and may also include the WRA Director.
- Any new systems or changes to systems that will affect reporting must be communicated to the MIS Managers as soon as information is available.
  - Obstacles that MIS faces with data include formatting, dates, missing or incomplete data.
- Never provide Personal Identifiable Information (PII) data to external agencies or sources without an MOU. Once the data requested is in the gatekeeper/division possession. It is the division's responsibility to keep all PII data private and confidential.
- If there seem to be connection issues to eReports (Cognos), please contact the data warehouse at dws_datawarehouse@utah.gov
- If there are issues with the data that is being pulled in eReports (Cognos), this will be an issue for MIS and needs to be added to Jira and assigned to MIS
- MIS only pulls data from systems.
  - If reporting is needed from MIS, all data needs to be put into a system and it is the responsibility of the division to work with DTS.
  - It is the responsibility of the division to train workers on the system and provide reliable and accurate data.

Reminders

- MIS provides reports for the Department, the Governor's Office, the Legislature, for the Federal Government (mandated), other state agencies and external requests among others. While we understand you have priorities, please understand that all divisions have priorities (including MIS) and while we will do our best to provide your data on time, providing data for higher priorities (along with working with other entities and other obstacles) may make the process longer than expected.
- Reporting is complex. Data can always be changing or new. Do not assume any report is easy. Although it may seem easy because it is a few aggregate numbers, the process to get accurate data can take time.

WORKFORCE
SERVICES
RESEARCH & ANALYSIS

- Data is only as good as the input into the system. In order for reporting to be accurate, users inputting data to the system should be relevant, complete, accurate and timely. Otherwise, results can be misunderstood and a waste of time, while also misdirecting action due to the data output.
- The quicker MIS gets a response/answer to a question, the less likely adjustments to due dates will need to happen.

WORKFORCE SERVICES
RESEARCH & ANALYSIS

Flowchart (reading order):

1. Requester works with Gatekeeper for needed data
2. Gatekeeper asks all questions needed to produce request in Jira (IE: report due date, data needed, report format, etc.)
3. Gatekeeper requests report from MIS through Jira
4. MIS reviews and determines if specs are complete
5. All information is gathered, questions are asked and answered between gatekeeper and MIS; prioritizations are made and communicated
6. MIS can begin request and communicates with gatekeeper with estimated timeline
7. MIS pulls data to finalized specs
8. MIS validates data and reviews request through identified processes
9. MIS sends data requested back to Gatekeeper
10. Gatekeeper reviews report and tests/validates
    - Requester/gatekeeper realizes changes will need to be made to specs
    - Request is approved and Jira issue is closed

This adds more time to request due date; process will start over again.

WORKFORCE SERVICES RESEARCH & ANALYSIS