SkillUP Report User Guide

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Services Provided Individual Report – by Provider

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page

Then click on Detailed Reports

Scroll down the Detailed Reports page until you see Services Reports and Click on Services Provided Individuals
Click on by Provider under the Service section

Local:

- List
- Registered Users Past Due

Service:

- List
- by Provider
- by Activity Completion Status
- by Education Level
- by Ethnicity
- by Grant
- by MSFW Status
- by Region/LWIA
- by Service Status
- by Staff Assigned
- by Staff Reported
- by Zip Code
- by Access Location
- by County
- by Enrollment Characteristics
- by Gender
- by Individual
- by Office
- by Race
- by Service Assistance Type
- by Services
- by Staff Edit
- by Work Status

Select SNAP E&T from the drop down list under Program
You may select the region from the list, (Note: if your agency operates in more than 1 region you will need to select all the appropriate regions.) For the purpose of this tutorial we will not select a region.

You may choose to pull this report by the staff member who is assigned to the case or by the staff that created the case. For the purpose of this tutorial we will not enter staff information.
Scroll down to the Date parameters and enter the appropriate dates, for this tutorial we will select the last quarter of this calendar year. Click Run Report

Note: you can filter by create date, actual begin date, last edit date or actual end date.

The Services Provided Individual – Provider report appears, use the arrow keys to go through the list to find your agency.
Click on the link with your agency’s name

<table>
<thead>
<tr>
<th>Provider</th>
<th>Distinct Users</th>
<th>Total Services</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>J. Largo' Academy Of Beauty Art, Llc</td>
<td>1</td>
<td>1</td>
<td>0.03 %</td>
</tr>
<tr>
<td>Teka Limb Deka Track Dynasty Driving Academy</td>
<td>7</td>
<td>17</td>
<td>0.21 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 01</td>
<td>5</td>
<td>20</td>
<td>0.69 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 02</td>
<td>17</td>
<td>64</td>
<td>2.54 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 04</td>
<td>17</td>
<td>50</td>
<td>0.91 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 06</td>
<td>7</td>
<td>15</td>
<td>0.45 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 07</td>
<td>7</td>
<td>40</td>
<td>1.21 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 09</td>
<td>42</td>
<td>170</td>
<td>5.14 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 10</td>
<td>14</td>
<td>50</td>
<td>1.78 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 11</td>
<td>8</td>
<td>20</td>
<td>0.88 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 13</td>
<td>10</td>
<td>74</td>
<td>2.24 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 14</td>
<td>5</td>
<td>18</td>
<td>0.54 %</td>
</tr>
<tr>
<td>CONVERSION LWMA 15</td>
<td>2</td>
<td>7</td>
<td>0.21 %</td>
</tr>
<tr>
<td>Conversion Provider</td>
<td>95</td>
<td>322</td>
<td>9.73 %</td>
</tr>
<tr>
<td>Central Region Workforce Investment Board</td>
<td>4</td>
<td>6</td>
<td>0.18 %</td>
</tr>
<tr>
<td>MERS GOODWILL INDUSTRIES</td>
<td>221</td>
<td>550</td>
<td>16.62 %</td>
</tr>
<tr>
<td>City of Springfield</td>
<td>30</td>
<td>154</td>
<td>4.85 %</td>
</tr>
<tr>
<td>Community Action Partnership of St. Joseph</td>
<td>2</td>
<td>3</td>
<td>0.09 %</td>
</tr>
<tr>
<td>Northeast Community Action Corporation</td>
<td>2</td>
<td>14</td>
<td>0.42 %</td>
</tr>
<tr>
<td>RESCARE</td>
<td>1</td>
<td>1</td>
<td>0.03 %</td>
</tr>
<tr>
<td>Delta Area Economic Opportunity Corporation</td>
<td>10</td>
<td>50</td>
<td>1.51 %</td>
</tr>
<tr>
<td>South Central Missouri Community Action Agency</td>
<td>6</td>
<td>10</td>
<td>0.30 %</td>
</tr>
<tr>
<td>Economic Security Corporation of the Southwest Area</td>
<td>10</td>
<td>44</td>
<td>1.33 %</td>
</tr>
<tr>
<td>Southeast Central Missouri Community Action Agency</td>
<td>6</td>
<td>12</td>
<td>0.36 %</td>
</tr>
</tbody>
</table>
The report for your agency will appear.

To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon

Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet
View Case Load by Case Manager

Click on Manage Case Assignment in the left navigation bar

Then Click on Individual Case Assignment

Please select from the Manage Case Assignment options listed below.

- **Individual Case Assignment**
  - Select this option to manage individual case assignments.

- **Employer Case Assignment**
  - Select this option to manage employer case assignments.

Then Click on View Case Load

Please select from the Individual Case Assignment options listed below.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Groups</td>
<td>Select this option to create, edit, or delete groups.</td>
</tr>
<tr>
<td>Individual Assignment</td>
<td>Select this option to assign individuals to a primary care manager or to a case management group.</td>
</tr>
<tr>
<td>Temporary Assignment</td>
<td>Select this option to temporarily assign one staff member’s cases to another staff member.</td>
</tr>
<tr>
<td>Group Re-assignment</td>
<td>Select this option to move cases from one group to another.</td>
</tr>
<tr>
<td>Case Assignment History</td>
<td>Select this option to view the case load for a staff member or group.</td>
</tr>
</tbody>
</table>
Select your agency from the Group Name list and select the appropriate region from the list, then click Filter. Note: if your agency works in multiple regions, you will need to run the report for each region.

A list of staff will appear under the Filter Criteria section, then you will click on the staff name. A Results View will appear with the participants that have been assigned to that case manager.
Active Cases Report

This report can be used to pull the active and exited cases in the case manager’s case load.

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

Case Management Reports

<table>
<thead>
<tr>
<th>Case Load</th>
<th>Case Load - WIOA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Case Load Reports</td>
<td>Display Case Load - WIOA Reports</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Case Load - Non-WIOA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Case Load - Non-WIOA Reports</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Payment Reports</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Predictive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Predictive Reports</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Staff Referrals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Staff Referrals Reports</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>WTP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display WTP Reports</td>
</tr>
</tbody>
</table>
Click on Active Cases

Report Type can be by LWIA/Office Location or by LWIA/Office Location/Assigned Case Manager

Program: SNAP Employment and Training

Customer Group: SNAP E and T

Region can be selected or you can leave as None Selected for the entire state.
Office Location can only be selected when a Region has been selected.

### Region/LWDB

<table>
<thead>
<tr>
<th>Status</th>
<th>Active</th>
<th>Inactive</th>
<th>All</th>
</tr>
</thead>
</table>

**Region/LWDB:**

(Press Ctrl to select multiple items)

- None Selected
- Central Region
- East Jackson County
- Jefferson/Franklin Consortium

### Office Status

<table>
<thead>
<tr>
<th>Status</th>
<th>Active</th>
<th>Inactive</th>
<th>All</th>
</tr>
</thead>
</table>

**Office Status:**

(Press Ctrl to select multiple items)

- PSD Partner Central
- Fulton Missouri Job Center Affiliate
- HEARTLAND INDEPENDENT LIVING CENTER
- JCCC - Jefferson City Correctional Center

The Case Manager Group will need to be selected if you want to see the case managers active cases, the group will be the name of your agency.

The Assigned Case Manager can be selected if you want a single case manager or leave none selected to see all case managers in that group.

Finally, select the date range and Click Run Report.
Days since Last Active Service

This report can be used to identify participants that are no longer participating or engaged in the SkillUP program and need to be exited in MoJobs.

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading
Click on Days since Last Active Service

Select the appropriate parameters for the report:

Program is SNAP Employment and Training

**Program:**

Select the Region and Office Location, you may select multiple regions by holding CTRL while selecting the regions.

**State Region:**

- Active
- Inactive
- All

**Region/LWDB Status:**

- Central Region
- East Jackson County
- Jefferson/Franklin Consortium
- Kansas City & Vicinity

**Office Status:**

- Active
- Inactive
- All

**Office Location:**

- MERS/GOODWILL - WASHINGTON COUNTY
- P AND P DISTRICT 11 - ROLLA
- P AND P DISTRICT 11S - STEELVILLE
- FSD Partner Ozark
Staff may select Case Manager Group and Assigned Case Manager if desired.

### Case Assignment

<table>
<thead>
<tr>
<th>Group Status:</th>
<th>Active</th>
<th>Inactive</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Case Manager Group:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Case Manager Status:</strong></td>
<td>Active</td>
<td>Inactive</td>
<td>All</td>
</tr>
<tr>
<td><strong>Assigned Case Manager:</strong></td>
<td>None Selected</td>
<td></td>
<td>Select Me</td>
</tr>
</tbody>
</table>

Select the date range

### Date

<table>
<thead>
<tr>
<th>Days Since Last Active Activity:</th>
<th>None Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>30 or Less</td>
</tr>
<tr>
<td></td>
<td>31 to 60 Days</td>
</tr>
<tr>
<td></td>
<td>61 to 90 Days</td>
</tr>
<tr>
<td></td>
<td>91 to 120 Days</td>
</tr>
<tr>
<td>Soft Exit:</td>
<td>Over 120 Days</td>
</tr>
</tbody>
</table>

Click Run Report

---

[Run Report]
To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon

Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet
Obtained Employment

This report is used by FSD to identify SNAP participants that have obtained employment while engaged in the SkillUP program. Provider staff can use this report to identify the participants that have obtained employment through assistance from their agency.

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

Click on Obtained Employment
Select the parameters for the report:

Program is SNAP Employment and Training

| Program: | SNAP Employment and Training |

Select the Region and Office Location or leave None Selected to pull for the entire state.

<table>
<thead>
<tr>
<th>Region/LWDB Status:</th>
<th>Active</th>
<th>Inactive</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region/LWDB:</td>
<td>None Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Central Region</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East Jackson County</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Jefferson/Franklin Consortium</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Office Status: | Active | Inactive | All |

| Office Location: | None Selected |

Staff can select the county and zip code if desired
Staff can filter by the Create Date or the Job Start Date

**Filter By Date:**
- Create Date
- Job Start Date

Select the date parameters

- **Date Range:** Last 90 Days
- **From:** 03/20/2019 (MM/DD/YYYY)
- **To:** 06/17/2019 (MM/DD/YYYY)

Click Run Report

To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon
Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet
Exited Cases

**Staff can use this report to identify cases that have exited within a certain timeframe.**

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading
Click on Exited Cases

Select the appropriate parameters for the report:

Program is SNAP Employment and Training and Customer Group is SNAP E and T

You can select Region and Office Location or leave None Selected to pull the entire state
You may also select the county, city and zip code if desired.

Outside the US:  🌍 No ☑ Yes

State:  🇺🇸 Missouri

County/Parish:  None Selected

Adair County
Andrew County
Atchison County

City:  

Zip Code:  None Selected

63005
63006
63010

Staff may select the Exit Reason or leave None Selected for all reasons

<table>
<thead>
<tr>
<th>Exit Reason:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None Selected</td>
</tr>
<tr>
<td>Closed due to employment</td>
</tr>
<tr>
<td>Closed due to not meeting requirements</td>
</tr>
<tr>
<td>Closed</td>
</tr>
<tr>
<td>Soft Exit</td>
</tr>
<tr>
<td>All Global Exclusions</td>
</tr>
<tr>
<td>All Exit Reasons</td>
</tr>
</tbody>
</table>

Then enter the Date parameters:

Filter By Date:  Exit Date

Date Range:  Last 90 Days

From:  03/20/2019 (MM/DD/YYYY)

To:  06/17/2019 (MM/DD/YYYY)

Click Run Report
To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon

Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet
Projected Begin Dates

This report can be used by provider staff to identify participants who have an upcoming training.

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page.

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading.

Case Management Reports

<table>
<thead>
<tr>
<th>Case Load</th>
<th>Case Load - Non-WIOA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Case Load Reports</td>
<td>Display Case Load - Non-WIOA Reports</td>
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<tr>
<th>Payment</th>
<th>Predictive</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Payment Reports</td>
<td>Display Predictive Reports</td>
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</tbody>
</table>

<table>
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<tr>
<th>Staff Referrals</th>
<th>WTP</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Staff Referrals Reports</td>
<td>Display WTP Reports</td>
</tr>
</tbody>
</table>

Click on Projected Begin Dates
Case Load:

- Active Cases
- Application
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Summary
- Days since Last Active Service
- Enrollment Summary By LWIA
- Exit Cases
- Hourly Wage Before and After Enrollment
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Summary
- Veteran Data Discrepancies

Select the appropriate parameters:

Program is SNAP Employment and Training, Group is SNAP E and T

Program:

- SNAP Employment and Training

Customer Group:

- None Selected
- SNAP E and T

Select the Region and Office Location or leave None Selected to pull the entire state

Region/LWDB Status:

- Active
- Inactive
- All

Region/LWDB:

- None Selected
- Central Region
- East Jackson County
- Jefferson/Franklin Consortium

Office Status:

- Active
- Inactive
- All

Office Location:

- None Selected

Staff may select County, City or Zip Code if desired
Staff may select the Provider for the upcoming training if desired

**Provider**

**Provider Status:**
- Active
- Inactive
- All

**Provider:**
2468 - William Jewell College
3252 - William Woods University
2802 - Wireco World Group
3265 - Wireless Infrastructure Association/irap

Staff may select the Assigned Case Manager Group and Case Manager if desired

**Case Assignment**

**Group Status:**
- Active
- Inactive
- All

**Case Manager Group:**
None Selected

**Case Manager Status:**
- Active
- Inactive
- All

**Assigned Case Manager:**
None Selected

Select the Date parameter

**Date**

**Days Before Projected Start:**
30 Days from Start
Click Run Report

Run Report

To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon

Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet

Do you want to open or save list.xlsx from app-jobs.mo.gov?

Open  Save  Cancel

Case Management Reports - Projected Begin Dates
- Program: Skill/Employment and Training
- Customer Group: SWAP C and T
- Days Before Projected Start: 30
Projected End Dates

This report can be used by provider staff to identify participants who will be completing a training in the near future.

Click on Reports in the Left Navigation Bar, then you will be directed to the Reports page.

Click on Detailed Reports.

Click on Case Load Reports under the Case Management Reports heading.

Case Management Reports

- **Case Load**
  - Display Case Load Reports
- **Case Load - WIOA**
  - Display Case Load - WIOA Reports
- **Payment**
  - Display Payment Reports
- **Staff Referrals**
  - Display Staff Referrals Reports

- **Case Load - Non-WIOA**
  - Display Case Load - Non-WIOA Reports
- **Documentation**
  - Display Documentation Reports
- **Predictive**
  - Display Predictive Reports
- **WTP**
  - Display WTP Reports
Click on Projected End Dates

Case Load:

- Active Cases
- Application
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Summary
- Days since Last Active Service
- Enrollment Summary By LWIA
- Exit Cases
- Hourly Wage Before and After Enrollment
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Summary
- Veteran Data Discrepancies

- Active Enrollment
- Assigned Case Load
- Case Closure Information
- Case Summary By Application Date
- Credentials
- Eligibility Enrollments
- Exit Reason Summary
- Expiring Work Authorization
- Measurable Skill Gains
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Targeted Measurable Skill Gain

Select the appropriate parameters:

Program is SNAP Employment and Training, Group is SNAP E and T

Select Region and Office Location or leave None Selected to pull the entire state
Staff may select County, City or Zip Code if desired

Outside the US:  
- No  
- Yes

State:  
Missouri

County/Parish:  
- None Selected
- Adair County
- Andrew County
- Atchison County

City:

Zip Code:  
- None Selected
- 63005
- 63006
- 63010

Staff may select the Provider for the upcoming training if desired

Provider Status:  
- Active
- Inactive
- All

Provider:
2468 - William Jewell College
3252 - William Woods University
2802 - Wireco World Group
3265 - Wireless Infrastructure Association/irap

Staff may select the Assigned Case Manager Group and Case Manager if desired

Group Status:  
- Active
- Inactive
- All

Case Manager Group:
- None Selected

Case Manager Status:  
- Active
- Inactive
- All

Assigned Case Manager:
- None Selected

Select the Date parameter

Days From Expiration:
- 30 Days from Expiration
Click Run Report

To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon

Click on Excel

Select Open to view the spreadsheet or Save to save the spreadsheet