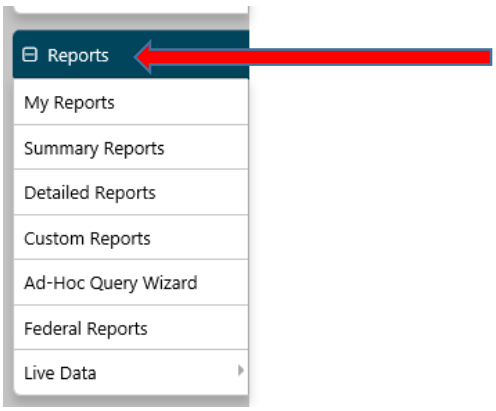
SkillUP Report User Guide

Contents

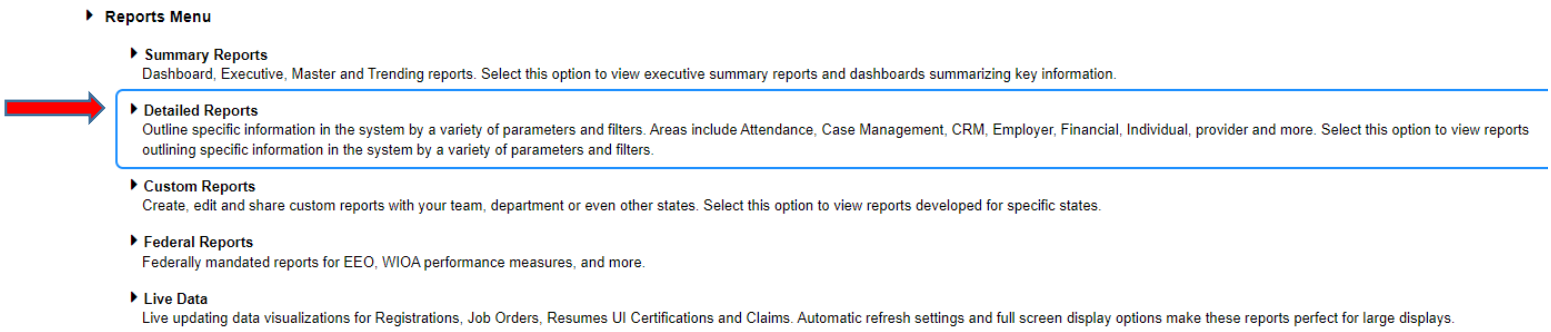
Services Provided Individual Report – by Provider 2
View Case Load by Case Manager 9
Active Cases Report 11
Days since Last Active Service 15
Obtained Employment 18
Exited Cases 22
Projected Begin Dates 26
Projected End Dates 30

Services Provided Individual Report – by Provider

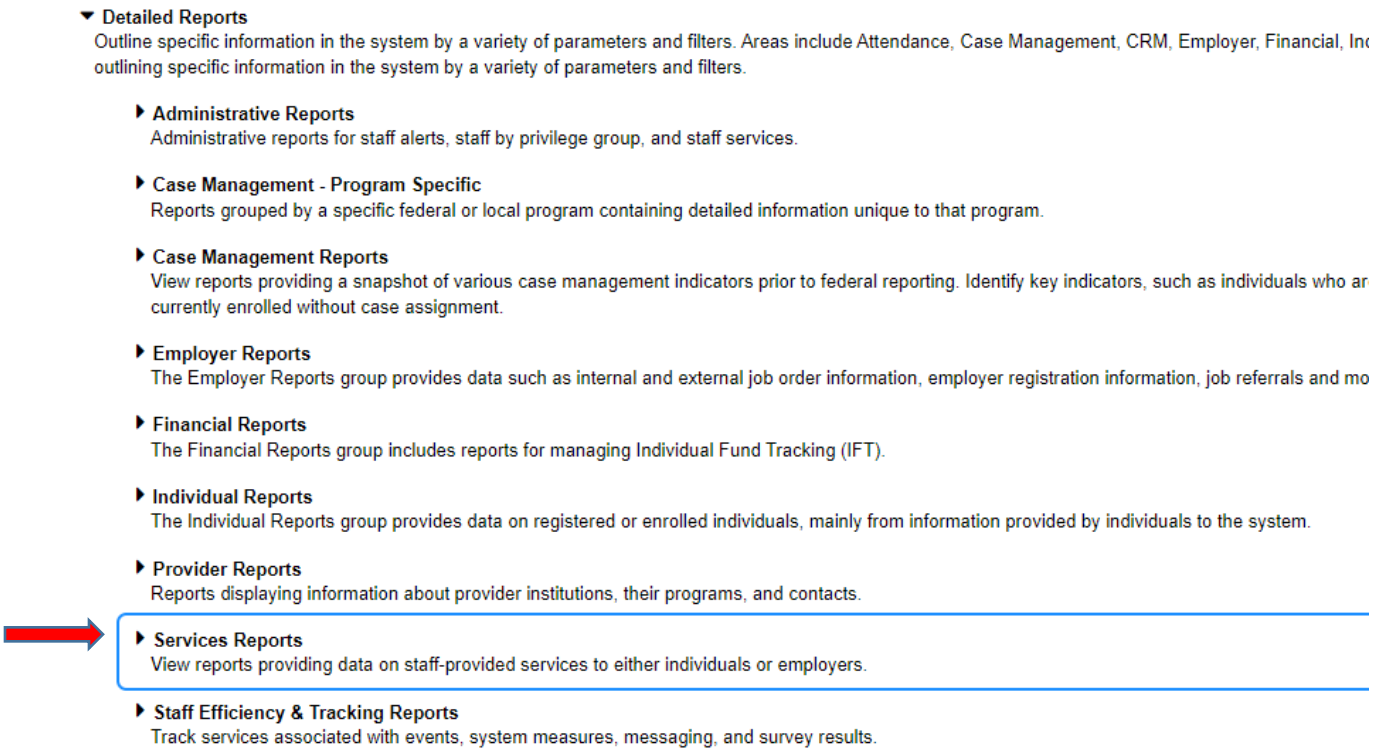
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



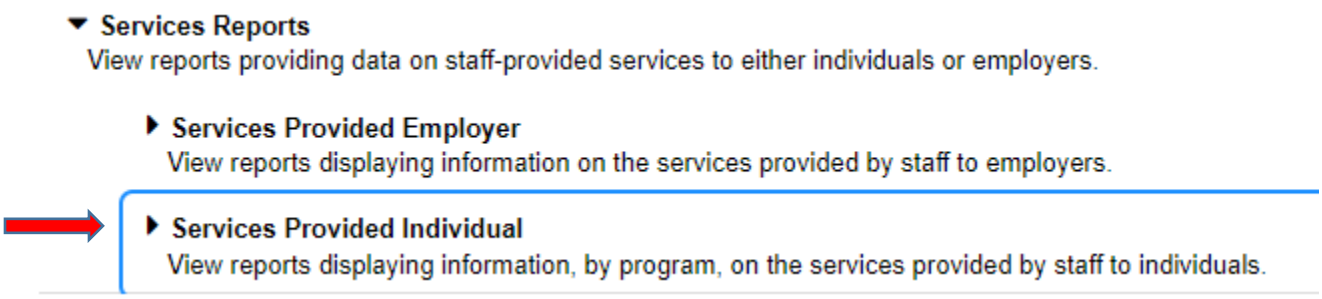
2. Click on the arrow next to "Detailed Reports" to expand:



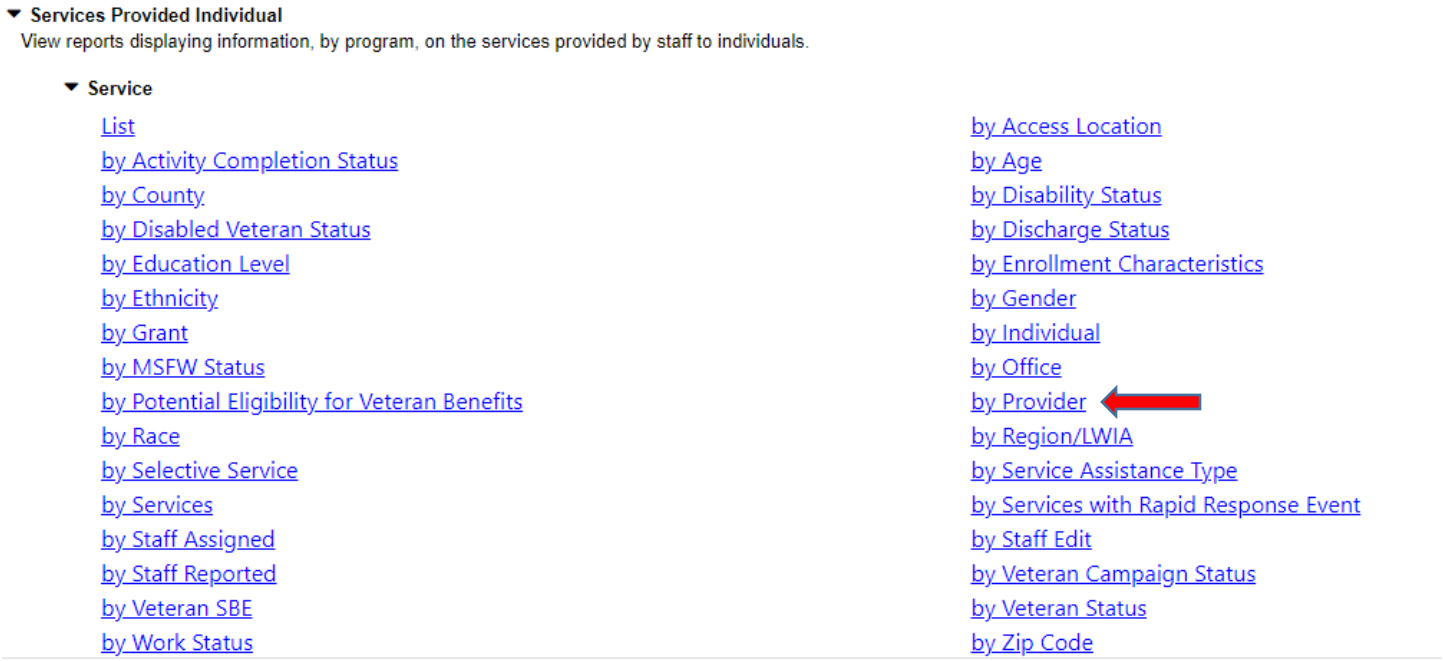
3. Scroll down under "Detailed Reports" until you see "Services Reports" and Click on the arrow next to it to expand:



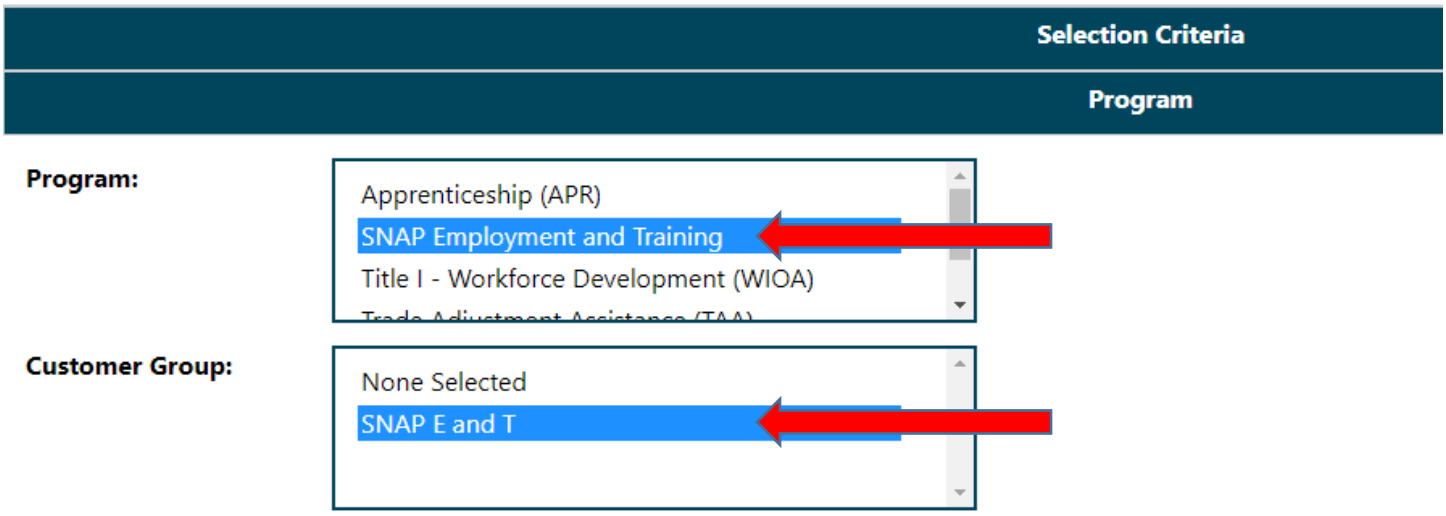
4. **Click the arrow next to "Services Provided Individual" Report to expand:**



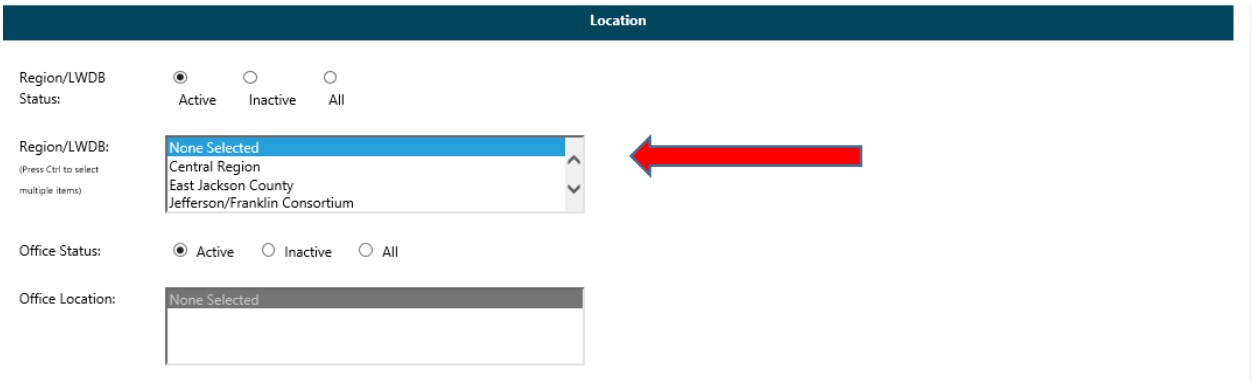
5. **Click on "by Provider" under the "Service" section:**



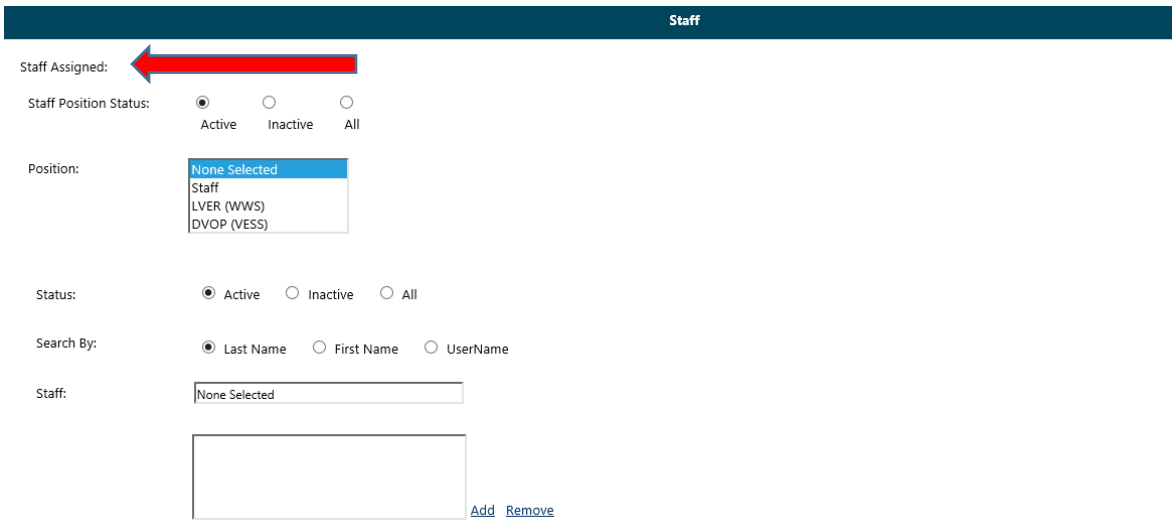
6. **Select "SNAP Employment and Training" from the list under "Program" and "SNAP E&T" under the "Customer Group":**

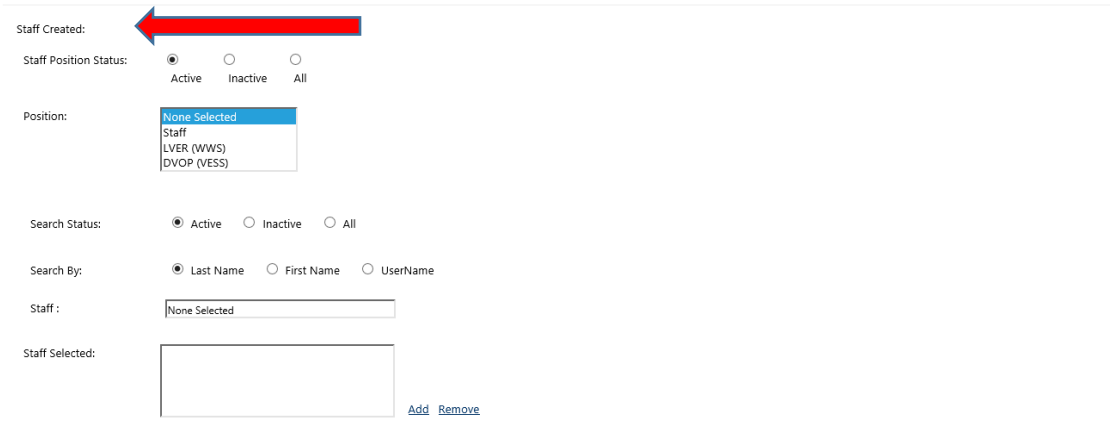


7. **You may select the region from the list, (Note: if your agency operates in more than 1 region you will need to select all the appropriate regions.) For the purpose of this tutorial we will not select a region:**

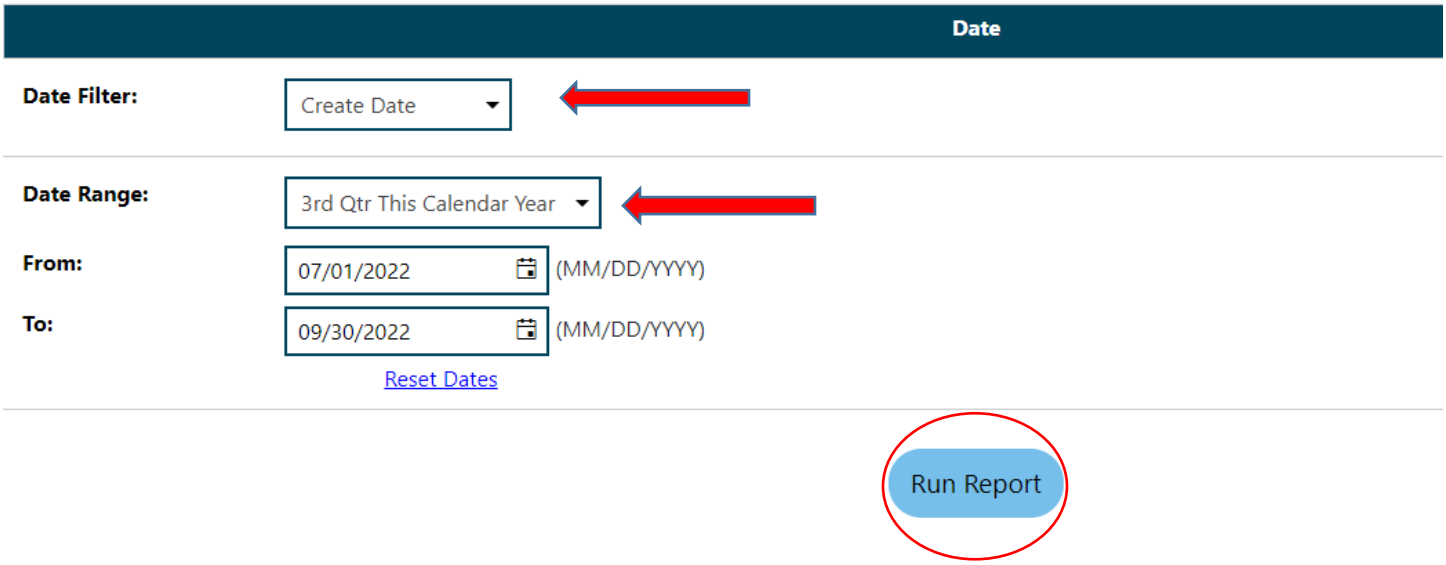


8. **You may choose to pull this report by the staff member who is assigned to the case or by the staff that created the case. For the purpose of this tutorial we will not enter staff information:**



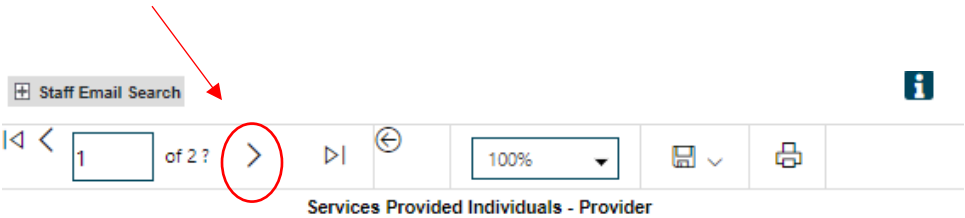


9. **Scroll down to the "Date parameters" and enter the appropriate dates. For this tutorial we will select the third quarter of this calendar year. Click "Run Report"**
   - **Note: you can filter by create date, actual begin date, last edit date or actual end date.**



10. The Services Provided Individual – Provider report appears

- **Use the arrow keys to go through the list to find your agency:**



Services Provided Individuals - Provider

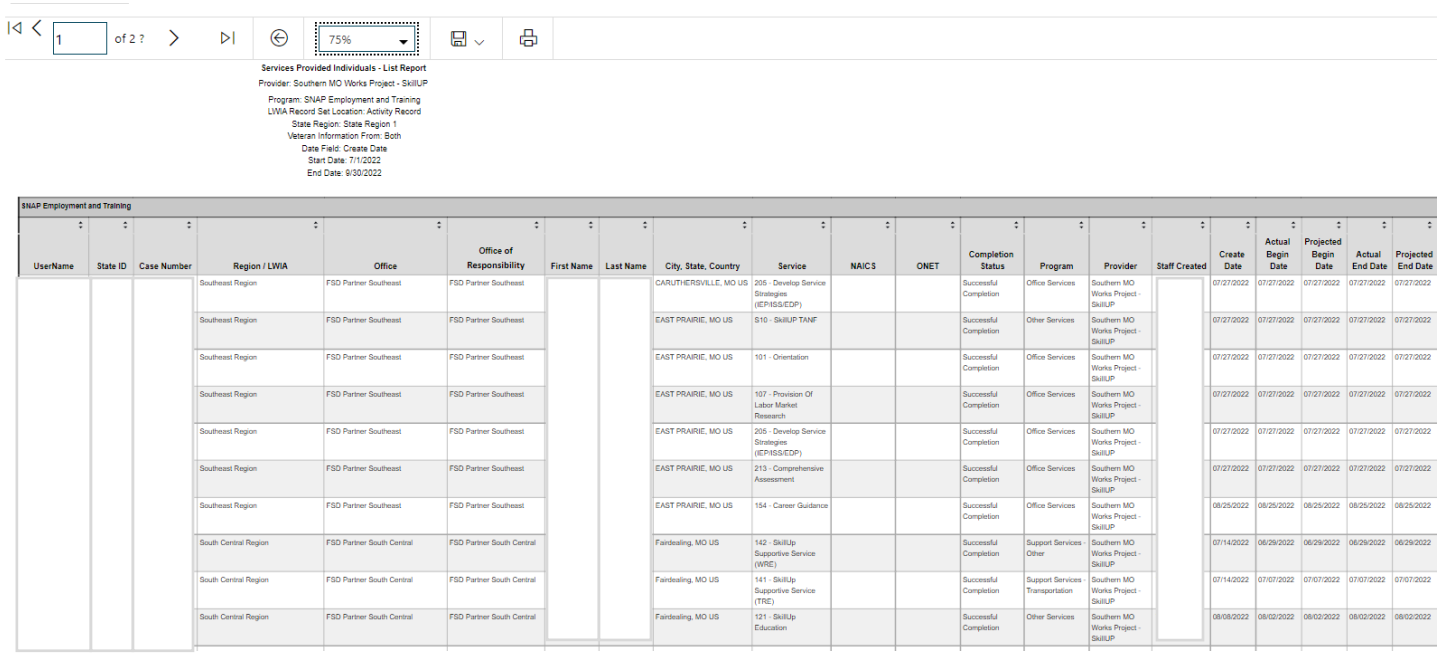
Program: SNAP Employment and Training
LWIA Record Set Location: Activity Record
State Region: State Region 1
Veteran Information From: Both
Date Field: Create Date
Start Date: 7/1/2022
End Date: 9/30/2022

Provider	Distinct Users	Total Services	% of Total
New Horizons Computer Learning Center, St. Louis	1	1	0.02%
Three Rivers College @ Kennett	1	1	0.02%
Metropolitan Community College, Workforce Develop	19	19	0.35%
Northwest Technical School	1	1	0.02%
Apex Cdl Institute, Llc	2	2	0.04%
160 Driving Academy	16	16	0.29%
Midwest Technical Institute	1	1	0.02%
Meds-Medical Education Development & Support, Llc	1	1	0.02%
Northwest Missouri State University, Continuing Ed	1	1	0.02%
University Of Central Missouri-Continuing Ed	1	1	0.02%
Pike Lincoln Technical Center	1	1	0.02%
New Reflections Technical Institute	1	1	0.02%
Saline County Career Center	1	1	0.02%
Applied Technology Services	2	2	0.04%
Texas County Technical College	2	2	0.04%
Cape Girardeau Career & Technology Center	2	2	0.04%
Medcerts, Llc	21	21	0.38%
Southern Missouri Truck Driving School	13	13	0.24%
Clement Truck Driving Academy	2	2	0.04%
Renaissance Beauty Academy	2	3	0.05%
J. Larae Academy Of Beauty Art, Llc	1	1	0.02%
Stl Training/special School District Of St. Louis	3	3	0.05%
Kansas City School Of Phlebotomy	1	1	0.02%
Tolda, Llc D/b/a Truck Dynasty Driving Academy	1	1	0.02%
Green Hills RPC	4	25	0.46%
BOONSLICK REGIONAL PLANNING COMMISSION	1	1	0.02%
Provider	Distinct Users	Total Services	% of Total
	1,479	5,481	100%
Total Rows: 104			

11. Click on the link with your agency's name:

Provider	Distinct Users	Total Services	% of Total
Life Uniforms	1	1	0.02%
QuikTrip Corporation	5	12	0.22%
Columbia College-Kansas City	1	1	0.02%
Concorde Career College	3	3	0.05%
East Central College	8	8	0.15%
WICHITA TECHNICAL INSTITUTE (M&H SCHOOLS INC)	1	1	0.02%
Gamm, Inc.	2	2	0.04%
MersGoodwill WIOA	5	30	0.55%
MERS GOODWILL INDUSTRIES	67	306	5.58%
Central Missouri Community Action Agency - SkillUP	30	107	1.95%
City of Springfield	3	15	0.27%
Missouri Valley Community Action Agency - SkillUP	13	60	1.09%
Community Action Partnership of St. Joseph - SkillUP	33	153	2.79%
Ozark Action Inc.	6	16	0.29%
Delta Area Economic Opportunity Corporation - SkillUP	20	121	2.21%
South Central Missouri Community Action Agency	3	16	0.29%
FAMILY AND WORKFORCE CENTERS OF AMERICA MWA - SkillUP	29	93	1.70%
Northwest-Trenton	1	7	0.13%
Northeast MO-Paris (NEMO)	4	15	0.27%
KC & Vicinity	2	2	0.04%
West Central Workforce Development Board	6	7	0.13%
St. Louis City/SLATE	3	15	0.27%
MO Department of Higher Education & Workforce Development	1	1	0.02%
Hannibal-Lagrange University	1	1	0.02%
Southern MO Works Project - SkillUP	205	922	16.82%
Bell Brown Medical Institute, Columbia	1	1	0.02%
Adair Cty Ambulance District - Academy	1	1	0.02%
Parkway Beauty Academy-(Beauty College)	1	1	0.02%
West Central Missouri Community Action Agency - SkillUP	16	85	1.55%
Provider	Distinct Users	Total Services	% of Total
	1,479	5,481	100%
Total Rows: 104			

12. The report for your agency will appear:



1 of 2 ? 75%

Services Provided Individuals - List Report

Provider: Southern MO Works Project - SkillUP

Program: SNAP Employment and Training

LWIA Record Set Location: Activity Record

State Region: State Region 1

Veteran Information From: Both

Date Field: Create Date

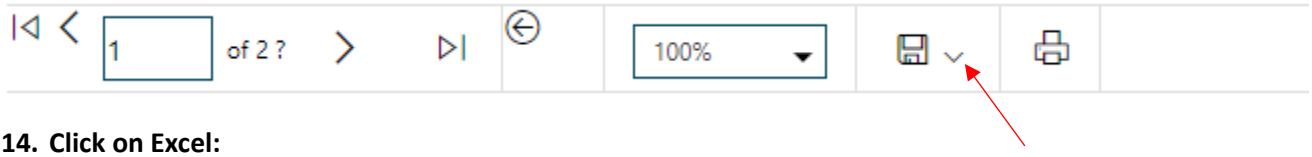
Start Date: 7/1/2022

End Date: 9/30/2022

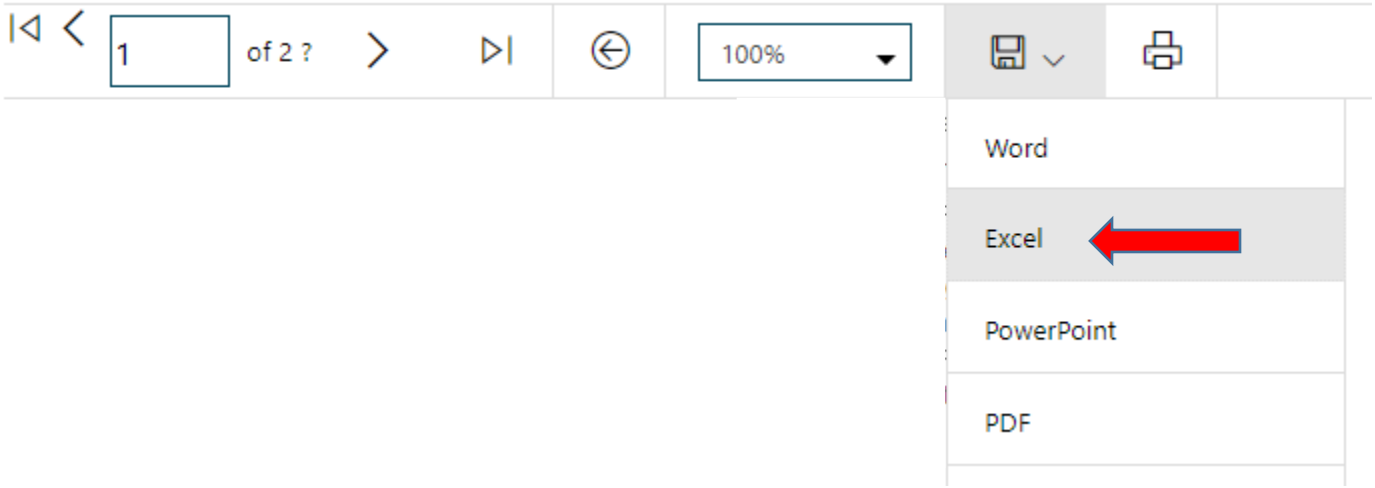
SNAP Employment and Training

UserName	State ID	Case Number	Region / LWIA	Office	Office of Responsibility	First Name	Last Name	City, State, Country	Service	NAICS	ONET	Completion Status	Program	Provider	Staff Created	Create Date	Actual Begin Date	Projected Begin Date	Actual End Date	Projected End Date
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			CARUTHERSVILLE, MO US	205 - Develop Service Strategies (IEP/ISS/EDP)			Successful Completion	Office Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	S10 - SkillUP TANF			Successful Completion	Other Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	101 - Orientation			Successful Completion	Office Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	107 - Provision Of Labor Market Research			Successful Completion	Office Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	205 - Develop Service Strategies (IEP/ISS/EDP)			Successful Completion	Office Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	213 - Comprehensive Assessment			Successful Completion	Office Services	Southern MO Works Project - SkillUP		07/27/2022	07/27/2022	07/27/2022	07/27/2022	07/27/2022
			Southeast Region	FSD Partner Southeast	FSD Partner Southeast			EAST PRAIRIE, MO US	154 - Career Guidance			Successful Completion	Office Services	Southern MO Works Project - SkillUP		08/25/2022	08/25/2022	08/25/2022	08/25/2022	08/25/2022
			South Central Region	FSD Partner South Central	FSD Partner South Central			Fairdealing, MO US	142 - SkillUp Supportive Service (WRE)			Successful Completion	Support Services - Other	Southern MO Works Project - SkillUP		07/14/2022	06/29/2022	06/29/2022	06/29/2022	06/29/2022
			South Central Region	FSD Partner South Central	FSD Partner South Central			Fairdealing, MO US	141 - SkillUp Supportive Service (TRE)			Successful Completion	Support Services - Transportation	Southern MO Works Project - SkillUP		07/14/2022	07/07/2022	07/07/2022	07/07/2022	07/07/2022
			South Central Region	FSD Partner South Central	FSD Partner South Central			Fairdealing, MO US	121 - SkillUp Education			Successful Completion	Other Services	Southern MO Works Project - SkillUP		08/08/2022	08/02/2022	08/02/2022	08/02/2022	08/02/2022

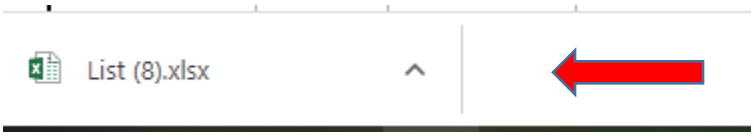
13. To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:



14. Click on Excel:

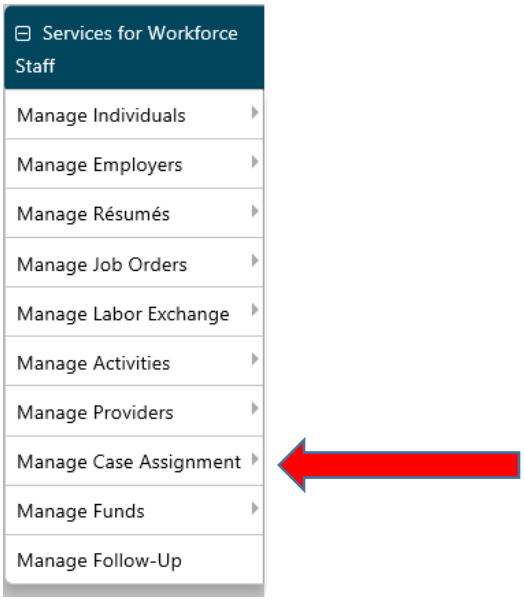


15. Click on the document on the taskbar to open/save the spreadsheet:

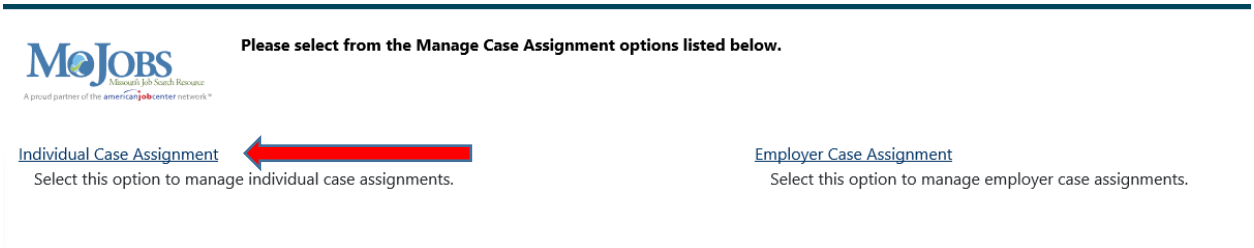


View Case Load by Case Manager

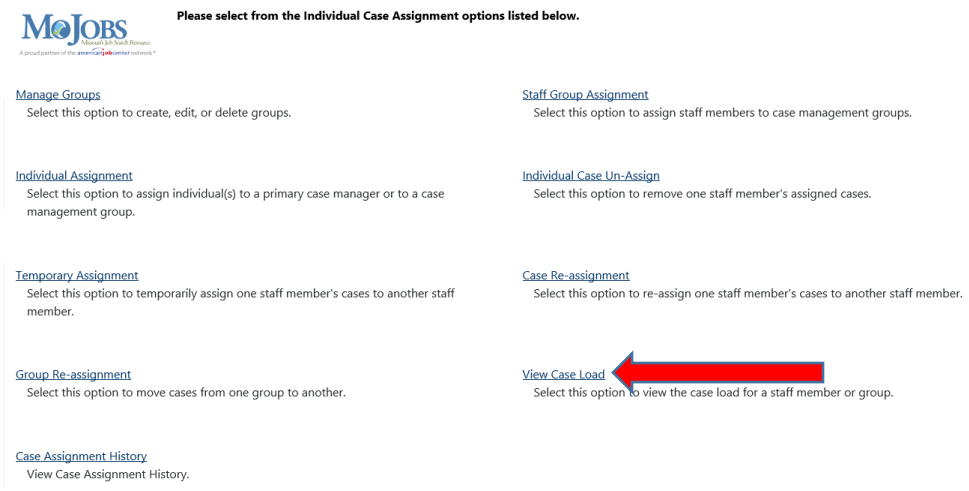
1. Click on "Manage Case Assignment" in the left navigation bar:



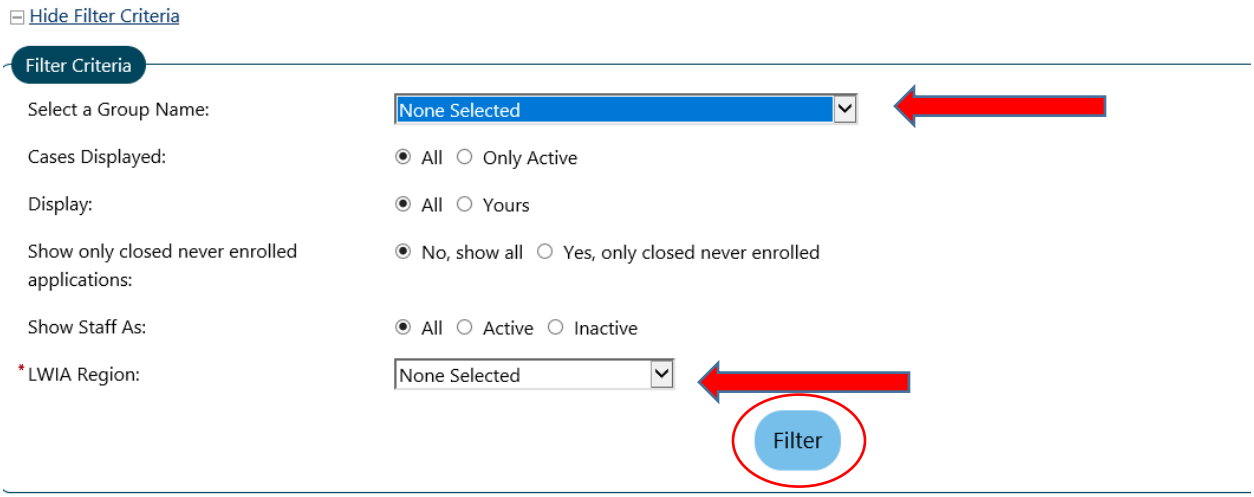
2. Click on "Individual Case Assignment":



3. Click on "View Case Load":



4. **Select your agency from the "Group Name" drop list and select the appropriate region from the "LWIA Region" drop list. Click Filter.**
   - ❖ **Note: if your agency works in multiple regions, you will need to run the report for each region.**



5. **A list of staff will appear under the Filter Criteria section, then you will click on the staff name**

Staff	Active Cases	Closed Cases	Follow-up Cases	Total Current Cases	Completed Follow-up Cases	Temporary Assignments	Apps Closed Never Enrolled	Active Staff
	0	0	0	0	0	0	0	Yes
Tasha	1	0	0	1	0	0	0	Yes
ıvan	0	0	0	0	0	0	0	Yes
ie	2	0	0	2	0	0	0	Yes
s	0	0	0	0	0	0	0	Yes
	2	0	0	2	0	0	0	Yes
isa	1	0	0	1	0	0	0	Yes

6. A Results View will appear with the participants that have been assigned to that case manager.

Results View: **Summary** | Detailed

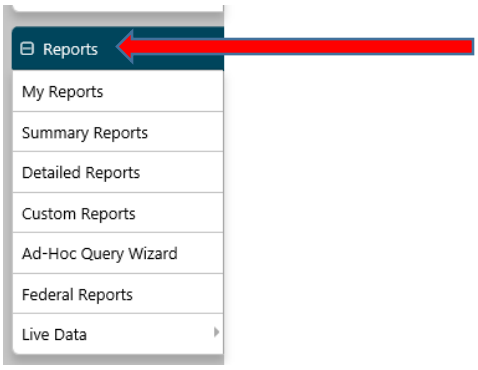
To sort on any column, click a column title. Current Sort: *Name ascending*

AppID	Name	Last 4 SSN	Case Manager	Program	Customer Group	Exit Date	4th Quarter Followup Date	State ID
				SNAP Employment and Training	SNAP E and T			
				SNAP Employment and Training	SNAP E and T			

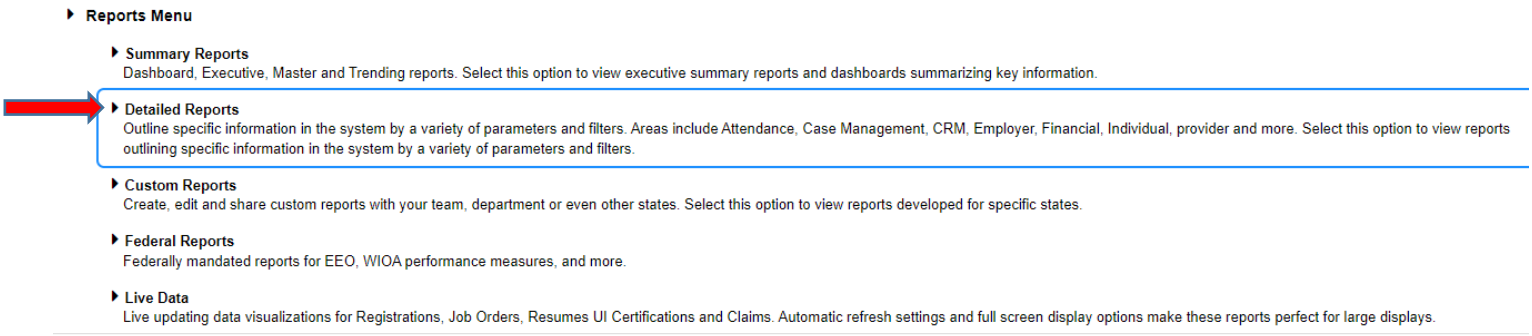
Active Cases Report

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

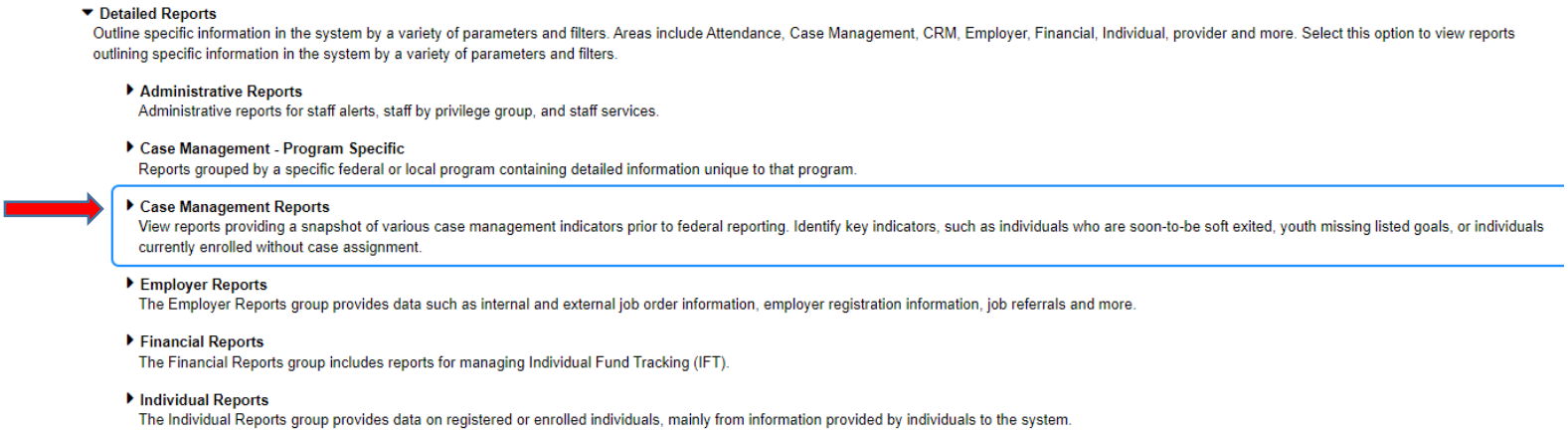
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



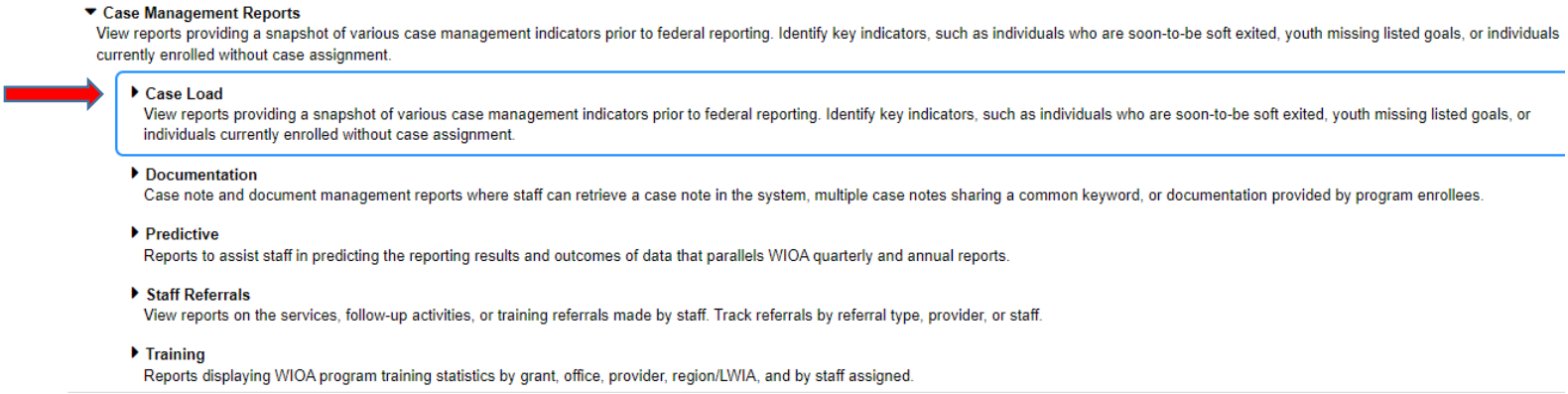
2. Click on the arrow next to "Detailed Reports" to expand:



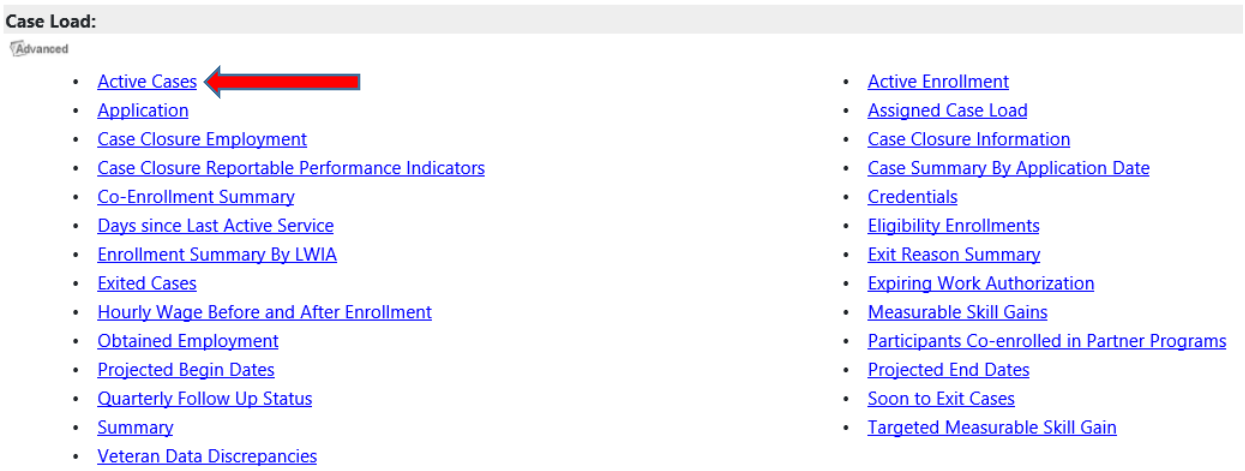
3. Click on the arrow next to "Case Management Reports" to expand:



4. Click on the arrow next to "Case Load" to expand:

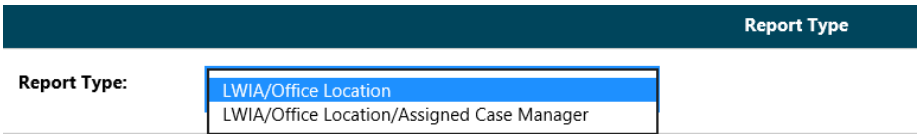


4. Click on "Active Cases":

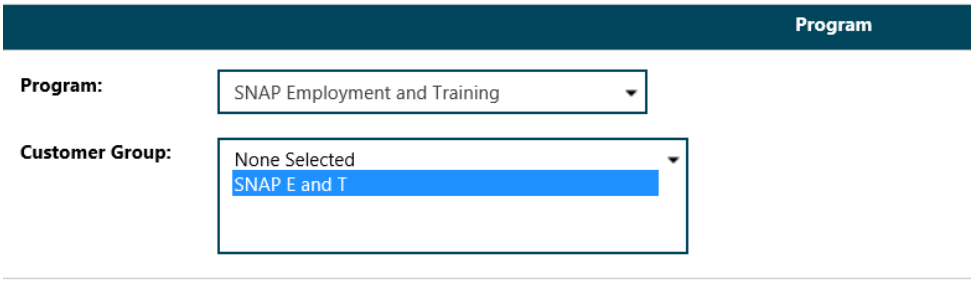


5. Choose the appropriate parameters:

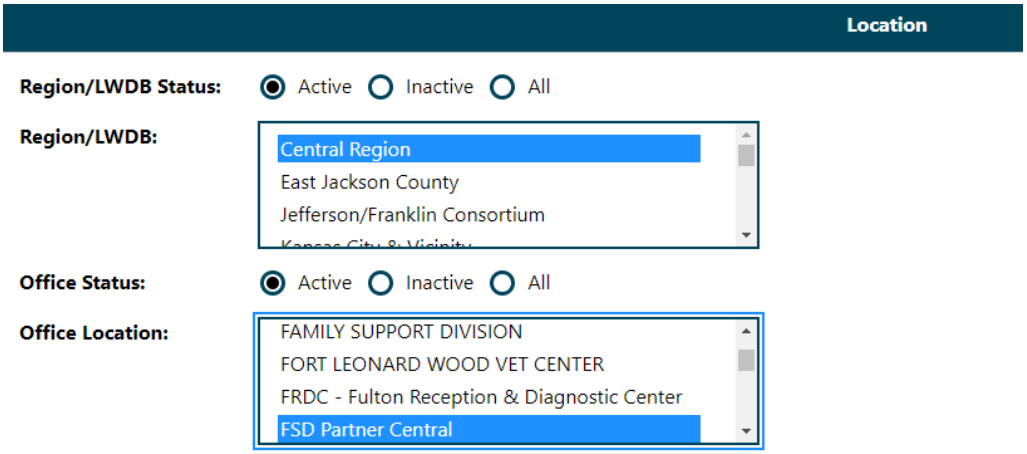
- Report Type can be by LWIA/Office Location or by LWIA/Office Location/Assigned Case Manager



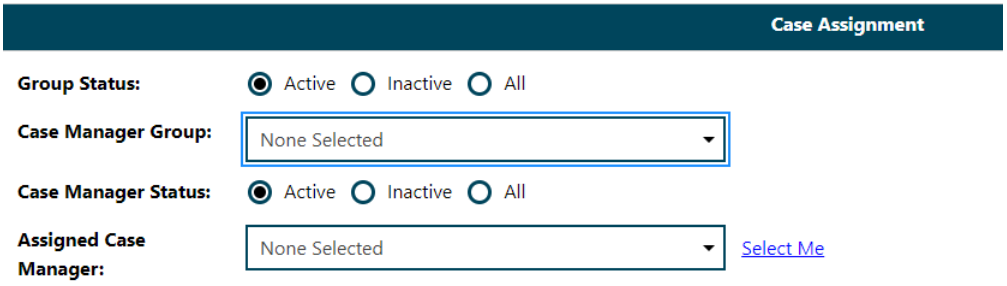
- Select "SNAP Employment and Training" for the Program and "SNAP E and T" for the Customer Group:



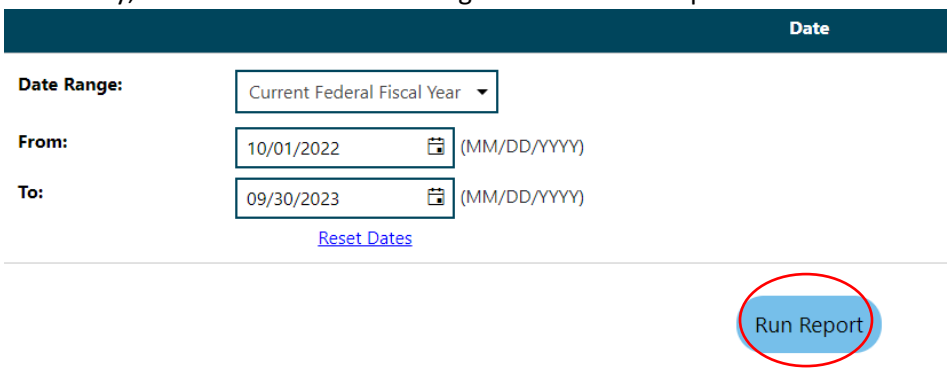
- Region must be selected. Office Location selection is optional. If you want to select multiple regions, press CTRL when selecting:



- The "Case Manager Group" will need to be selected if you want to see the case manager's 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 *desired* date range and Click Run Report:



6. **Your report results will display based on filter criteria selected:**

Staff Email Search

1 of 1 100%

Active Cases Report

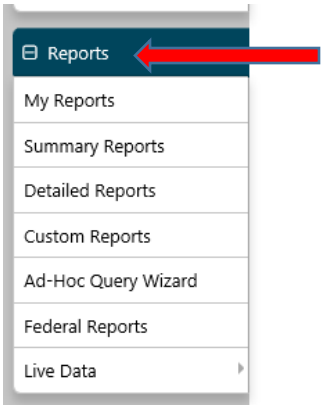
Program: SNAP Employment and Training
Customer Group: SNAP E and T
Report Type: LWIA/Office Location/Assigned Case Manager
LWIA/Region: Central Region
Office: FSD Partner Central
Date Range: 10/1/2022 - 9/30/2023
Report Run Time: 10/3/2022 3:54:51 PM

Office/Location	Assigned Staff	Active Cases	Closed Cases	Exit Cases
FSD Partner Central		1	0	0
FSD Partner Central		1	0	0
FSD Partner Central		6	0	0
FSD Partner Central		45	0	5
Office/Location	Assigned Staff	Active Cases	Closed Cases	Exit Cases
Total:		53	0	5
Total Rows: 4				

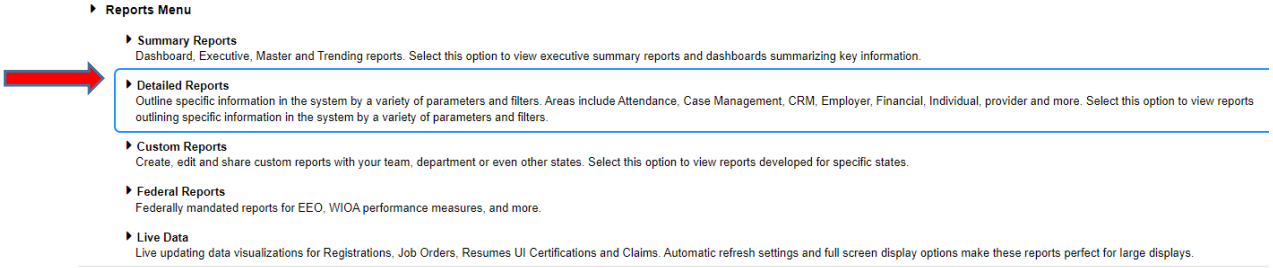
Days since Last Active Service

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.

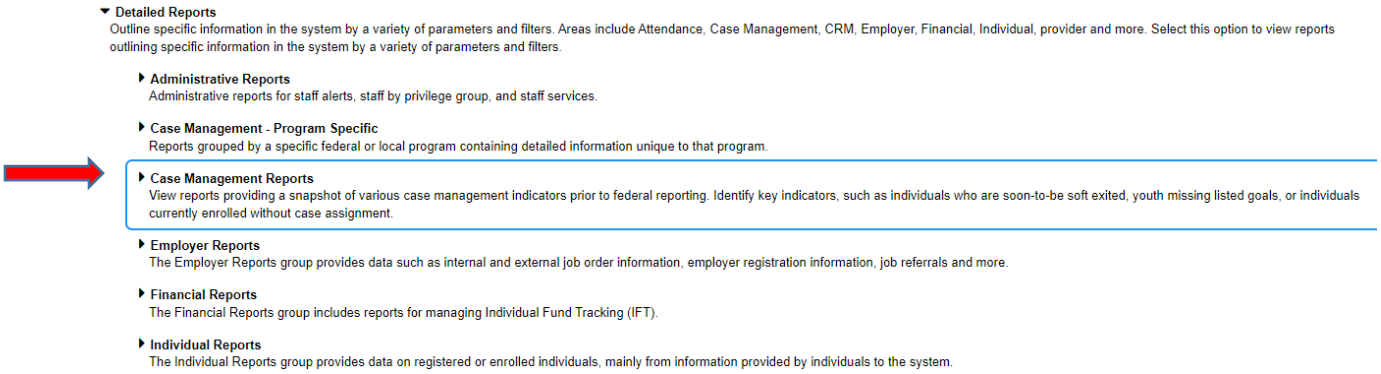
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



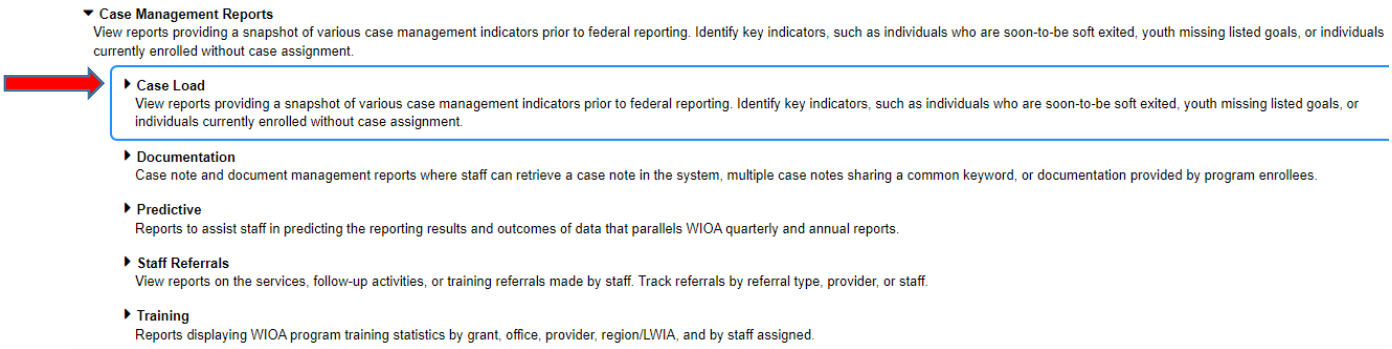
2. Click on the arrow next to "Detailed Reports" to expand:



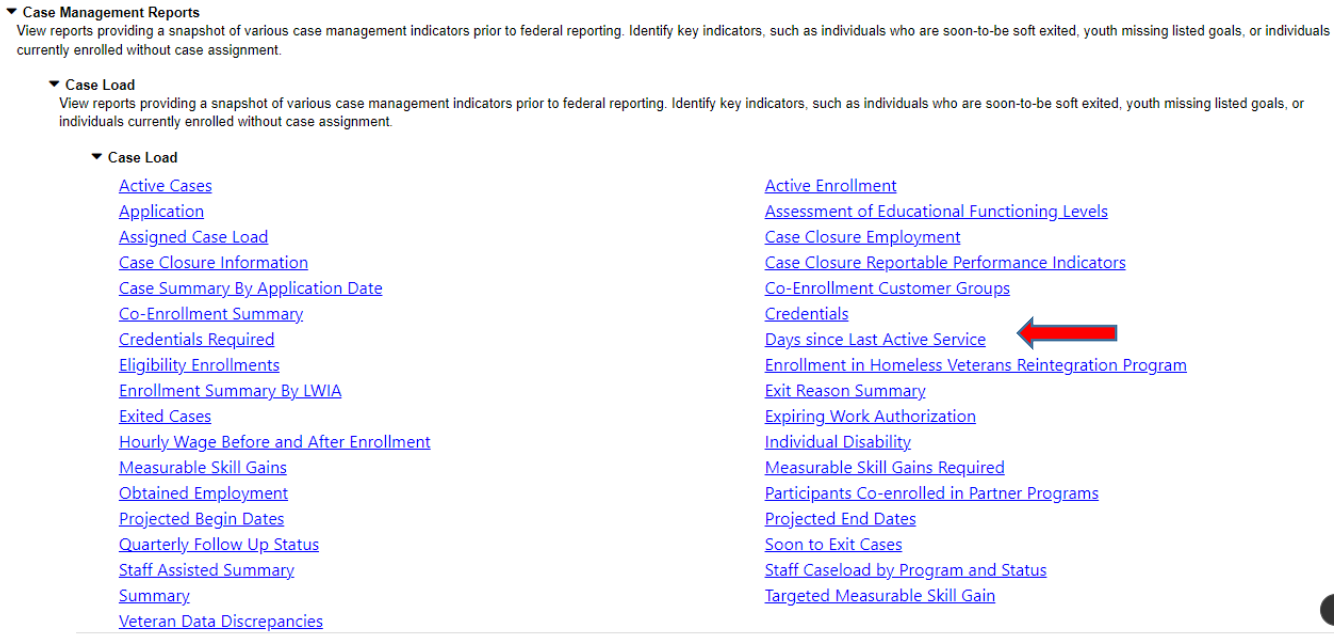
3. Click on the arrow next to "Case Management Reports" to expand:



4. Click on the arrow next to "Case Load" to expand:

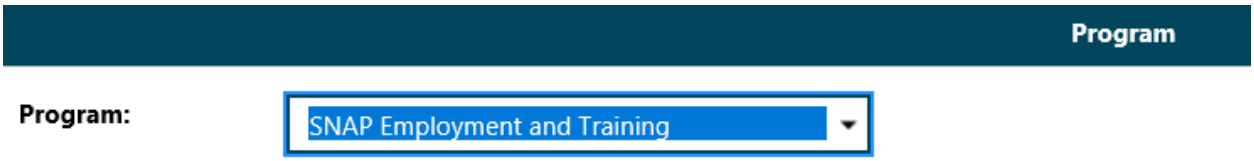


5. Click on "Days since Last Active Service"

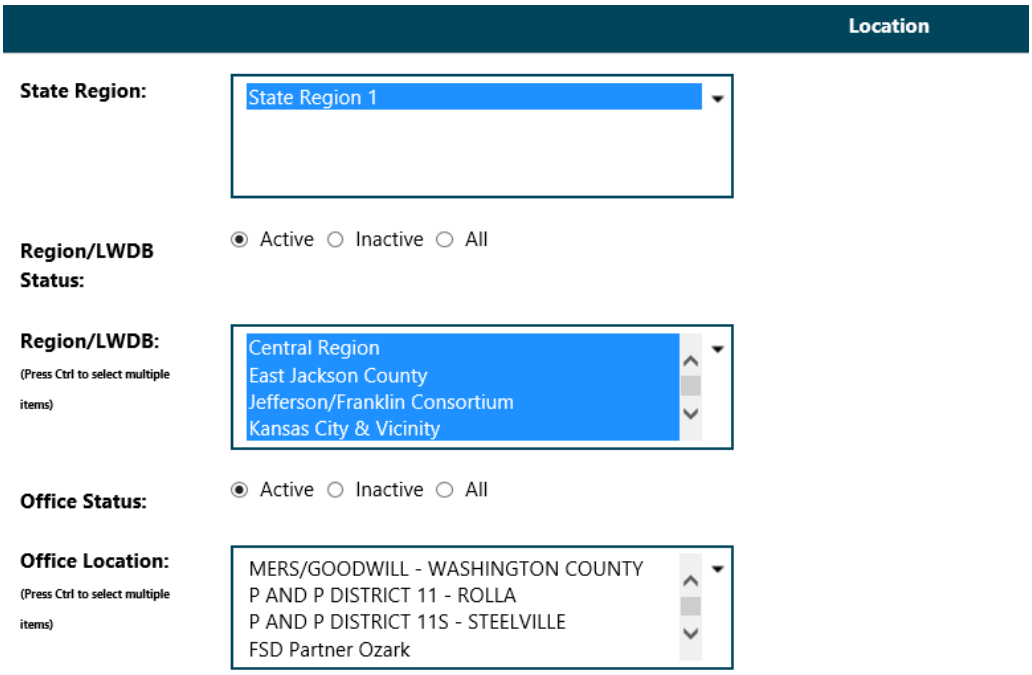


6. Select the appropriate parameters for the report:

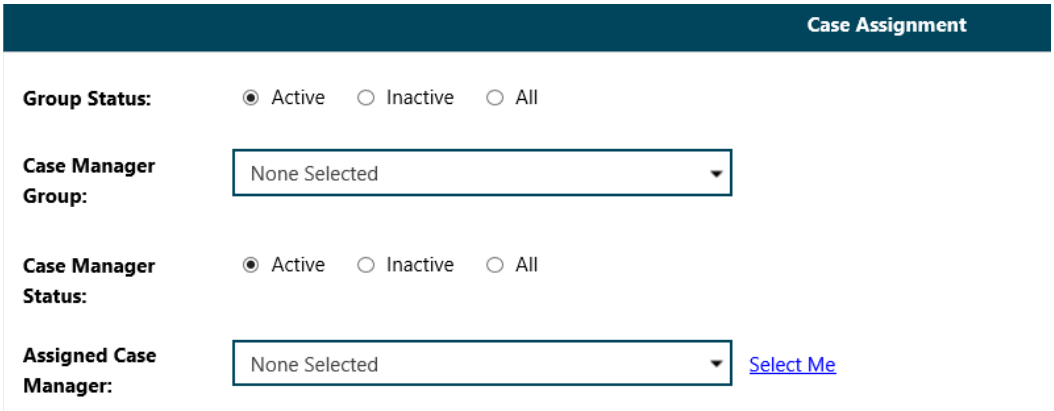
- Program is SNAP Employment and Training



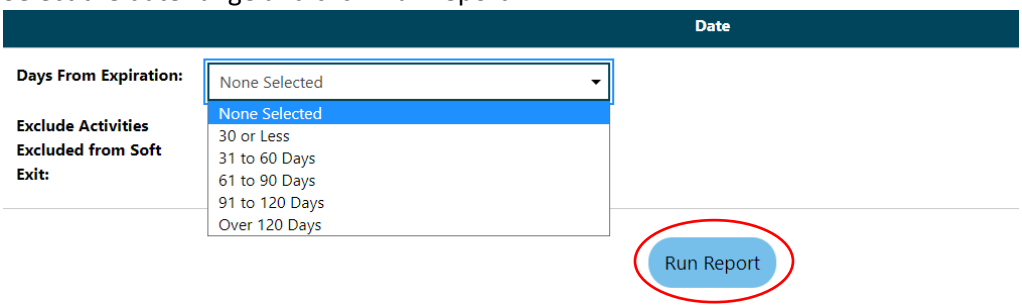
- Region and Office Location; you may select multiple regions by holding CTRL while selecting the regions:



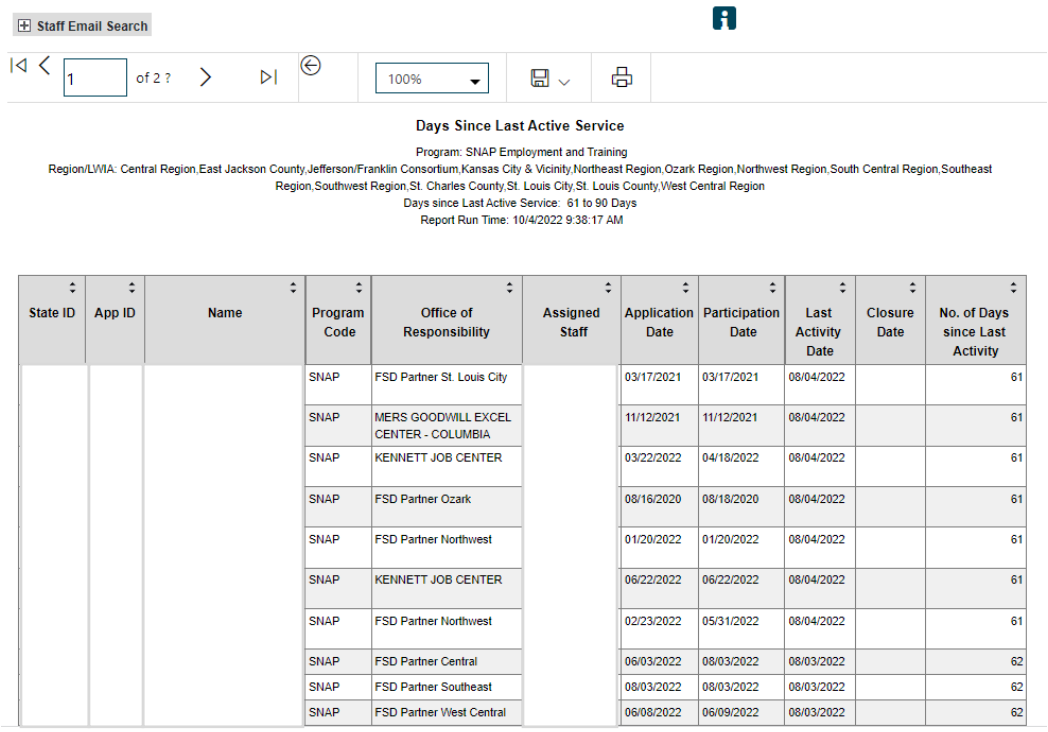
❖ Case Manager Group and Assigned Case Manager; Staff may select, if desired:



❖ Select the date range and click "run report":

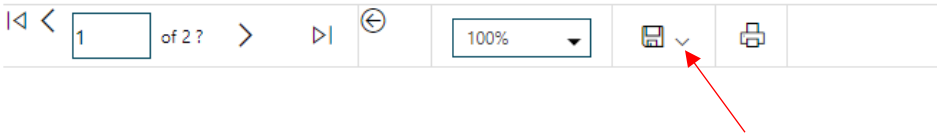


7. Your report results will display based on filter criteria selected:

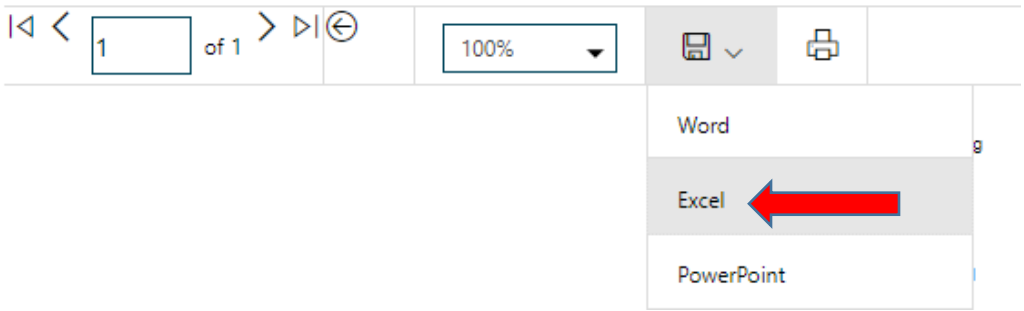


State ID	App ID	Name	Program Code	Office of Responsibility	Assigned Staff	Application Date	Participation Date	Last Activity Date	Closure Date	No. of Days since Last Activity
			SNAP	FSD Partner St. Louis City		03/17/2021	03/17/2021	08/04/2022		61
			SNAP	MERS GOODWILL EXCEL CENTER - COLUMBIA		11/12/2021	11/12/2021	08/04/2022		61
			SNAP	KENNETT JOB CENTER		03/22/2022	04/18/2022	08/04/2022		61
			SNAP	FSD Partner Ozark		08/16/2020	08/18/2020	08/04/2022		61
			SNAP	FSD Partner Northwest		01/20/2022	01/20/2022	08/04/2022		61
			SNAP	KENNETT JOB CENTER		06/22/2022	06/22/2022	08/04/2022		61
			SNAP	FSD Partner Northwest		02/23/2022	05/31/2022	08/04/2022		61
			SNAP	FSD Partner Central		06/03/2022	08/03/2022	08/03/2022		62
			SNAP	FSD Partner Southeast		08/03/2022	08/03/2022	08/03/2022		62
			SNAP	FSD Partner West Central		06/08/2022	06/09/2022	08/03/2022		62

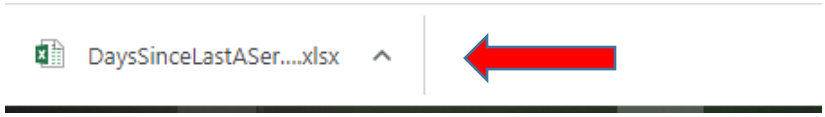
8. To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:



9. **Click on Excel:**



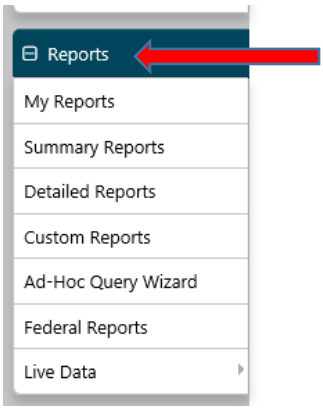
10. **Click on the document on the taskbar to open/save the spreadsheet:**



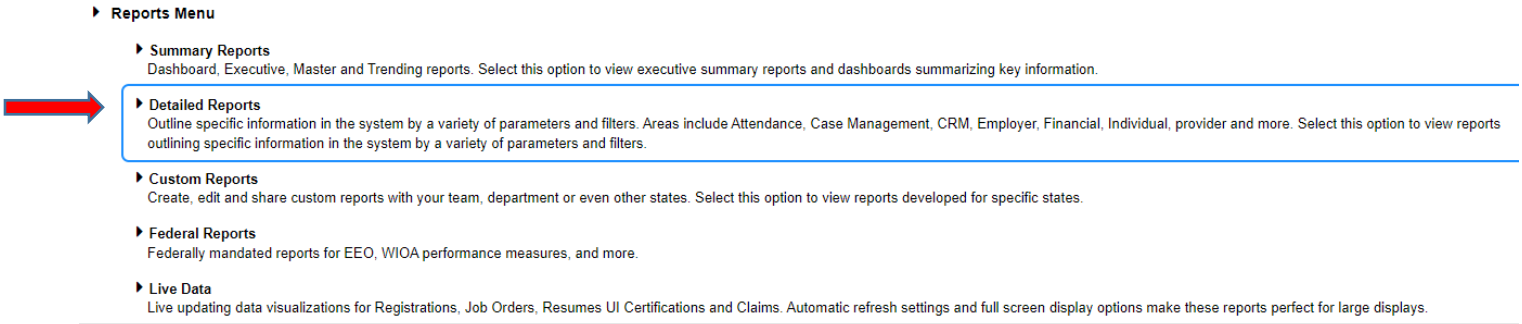
Obtained Employment

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.

1. **Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:**



2. **Click on the arrow next to "Detailed Reports" to expand:**



3. Click on the arrow next to "Case Management Reports" to expand:

Detailed Reports
Outline specific information in the system by a variety of parameters and filters. Areas include Attendance, Case Management, CRM, Employer, Financial, Individual, provider and more. Select this option to view reports outlining specific information in the system by a variety of parameters and filters.

- **Administrative Reports**
  Administrative reports for staff alerts, staff by privilege group, and staff services.
- **Case Management - Program Specific**
  Reports grouped by a specific federal or local program containing detailed information unique to that program.
- **Case Management Reports**
  View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.
- **Employer Reports**
  The Employer Reports group provides data such as internal and external job order information, employer registration information, job referrals and more.
- **Financial Reports**
  The Financial Reports group includes reports for managing Individual Fund Tracking (IFT).
- **Individual Reports**
  The Individual Reports group provides data on registered or enrolled individuals, mainly from information provided by individuals to the system.

4. Click on the arrow next to "Case Load" to expand:

Case Management Reports
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

- **Case Load**
  View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.
- **Documentation**
  Case note and document management reports where staff can retrieve a case note in the system, multiple case notes sharing a common keyword, or documentation provided by program enrollees.
- **Predictive**
  Reports to assist staff in predicting the reporting results and outcomes of data that parallels WIOA quarterly and annual reports.
- **Staff Referrals**
  View reports on the services, follow-up activities, or training referrals made by staff. Track referrals by referral type, provider, or staff.
- **Training**
  Reports displaying WIOA program training statistics by grant, office, provider, region/LWIA, and by staff assigned.

5. Click on "Obtained Employment":

Case Management Reports
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

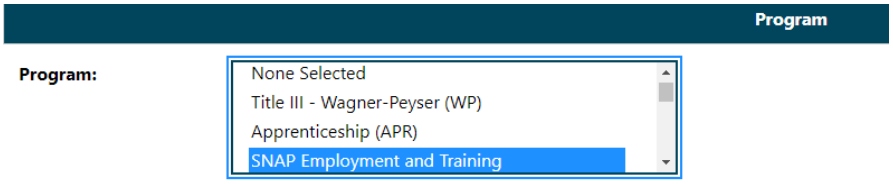
Case Load
View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

Case Load

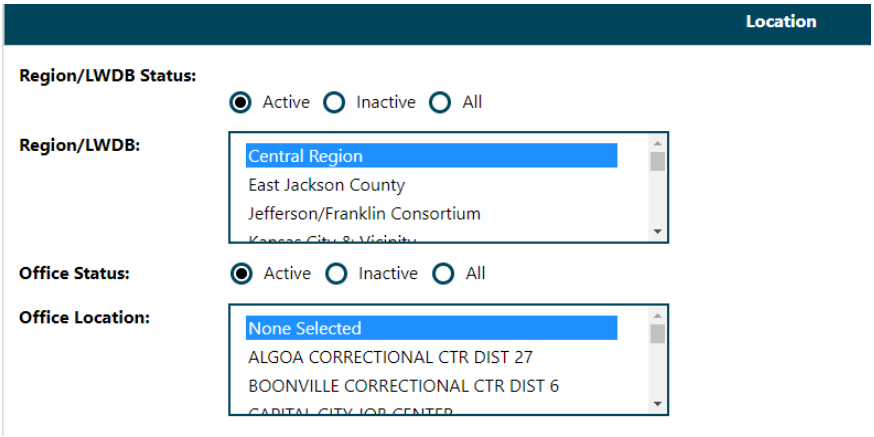
- Active Cases
- Application
- Assigned Case Load
- Case Closure Information
- Case Summary By Application Date
- Co-Enrollment Summary
- Credentials Required
- Eligibility Enrollments
- Enrollment Summary By LWIA
- Exited Cases
- Hourly Wage Before and After Enrollment
- Measurable Skill Gains
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Staff Assisted Summary
- Summary
- Veteran Data Discrepancies
- Active Enrollment
- Assessment of Educational Functioning Levels
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Customer Groups
- Credentials
- Days since Last Active Service
- Enrollment in Homeless Veterans Reintegration Program
- Exit Reason Summary
- Expiring Work Authorization
- Individual Disability
- Measurable Skill Gains Required
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Staff Caseload by Program and Status
- Targeted Measurable Skill Gain

6. **Select the parameters for the report:**

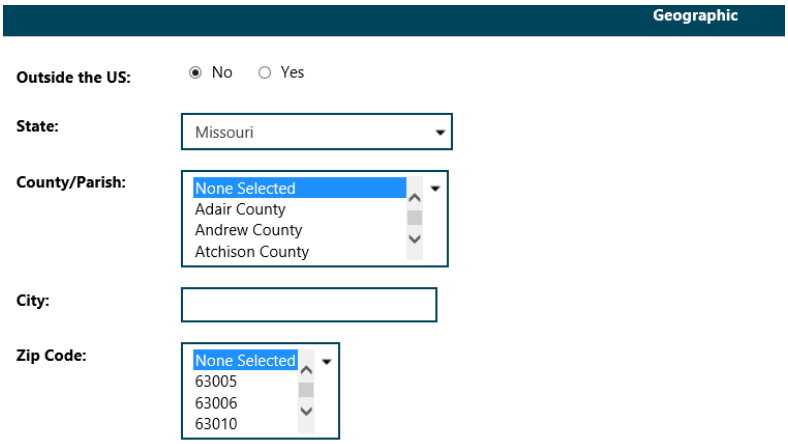
- Program is SNAP Employment and Training



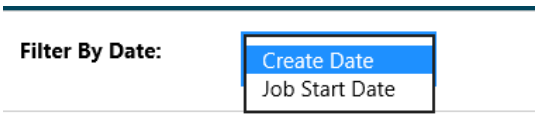
- Region and Office Location; you may select multiple regions by holding CTRL while selecting the regions:



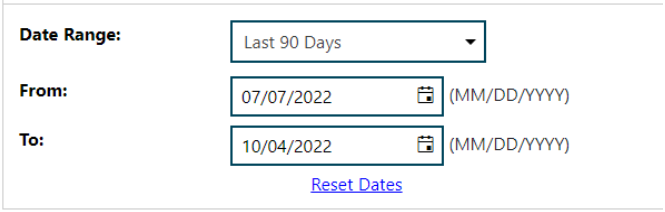
- Staff can select the county and zip code, if desired:



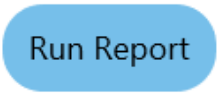
- Staff can filter by the Create Date or the Job Start Date:



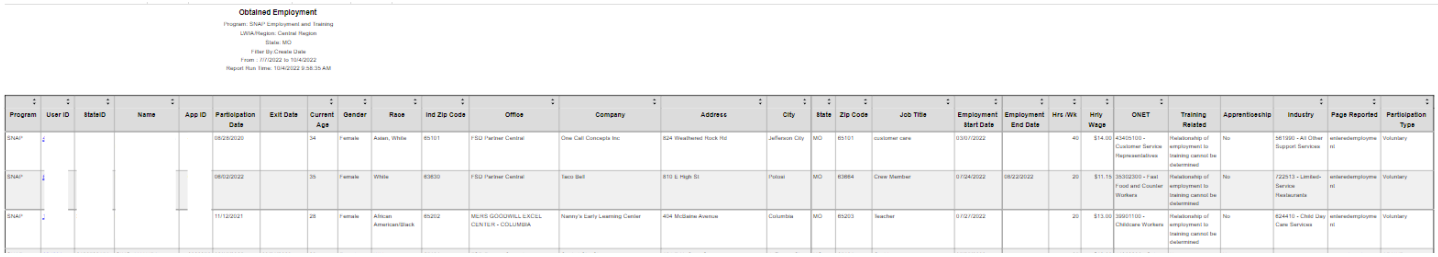
- Select the date parameters



❖ Click Run Report



7. Your report results will display based on filter criteria selected:

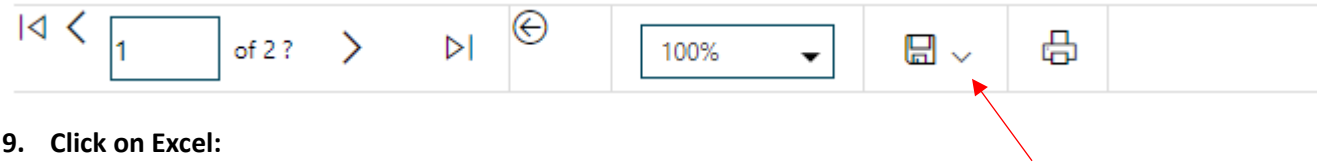


Obtained Employment

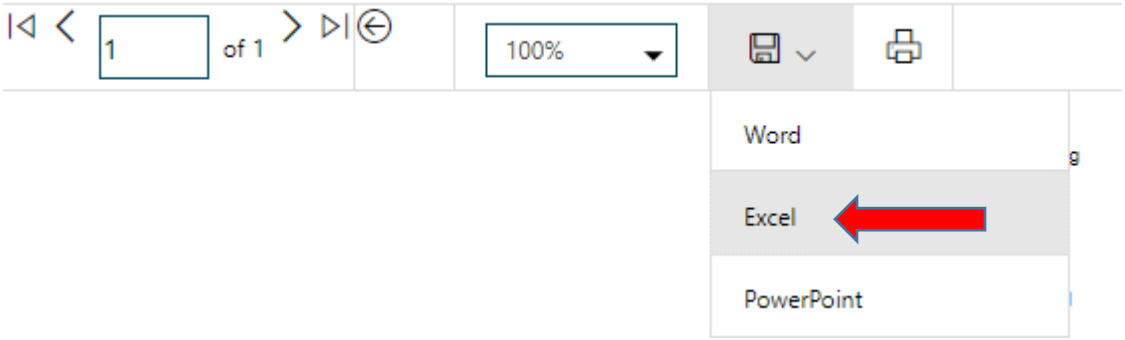
Program: SNAP Employment and Training
LWIA/Region: Central Region
State: MO
Filter By:Create Date
From : 7/7/2022 to 10/4/2022
Report Run Time: 10/4/2022 9:58:35 AM

Program	User ID	StateID	Name	App ID	Participation Date	Exit Date	Current Age	Gender	Race	Ind Zip Code	Office	Company	Address	City	State	Zip Code	Job Title	Employment Start Date	Employment End Date	Hrs /Wk	Hrly Wage	ONET	Training Related	Apprenticeship	Industry	Page Reported	Participation Type
SNAP	[illegible]				08/28/2020		34	Female	Asian, White	65101	FSD Partner Central	One Call Concepts Inc	824 Weathered Rock Rd	Jefferson City	MO	65101	customer care	03/07/2022		40	$14.00	43405100 - Customer Service Representatives	Relationship of employment to training cannot be determined	No	561990 - All Other Support Services	enteredemployment	Voluntary
SNAP	[illegible]				06/02/2022		35	Female	White	63630	FSD Partner Central	Taco Bell	810 E High St	Potosi	MO	63664	Crew Member	07/24/2022	08/22/2022	20	$11.15	35302300 - Fast Food and Counter Workers	Relationship of employment to training cannot be determined	No	722513 - Limited-Service Restaurants	enteredemployment	Voluntary
SNAP	[illegible]				11/12/2021		28	Female	African American/Black	65202	MERS GOODWILL EXCEL CENTER - COLUMBIA	Nanny's Early Learning Center	404 McBaine Avenue	Columbia	MO	65203	teacher	07/27/2022		20	$13.00	39301100 - Childcare Workers	Relationship of employment to training cannot be determined	No	624410 - Child Day Care Services	enteredemployment	Voluntary

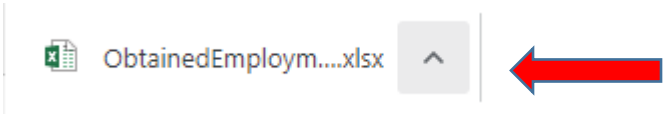
8. To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:



9. Click on Excel:



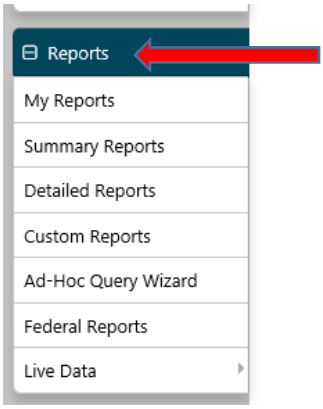
10. Click on the document on the taskbar to open/save the spreadsheet:



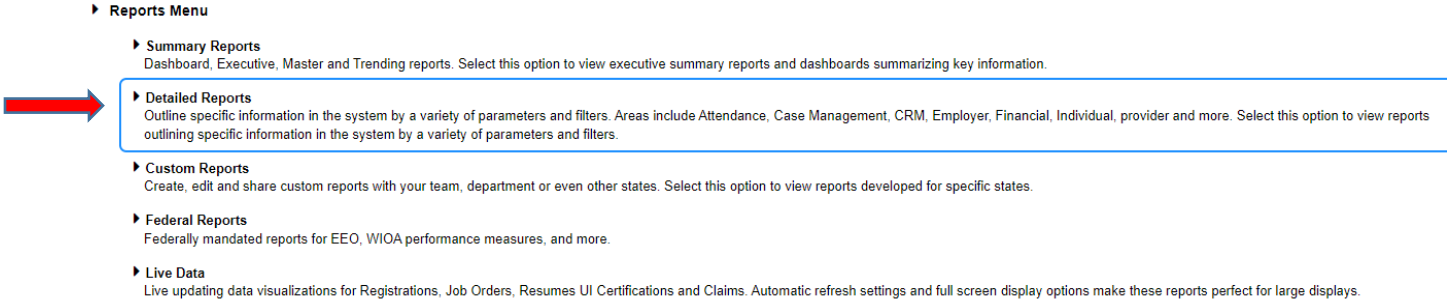
Exited Cases

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

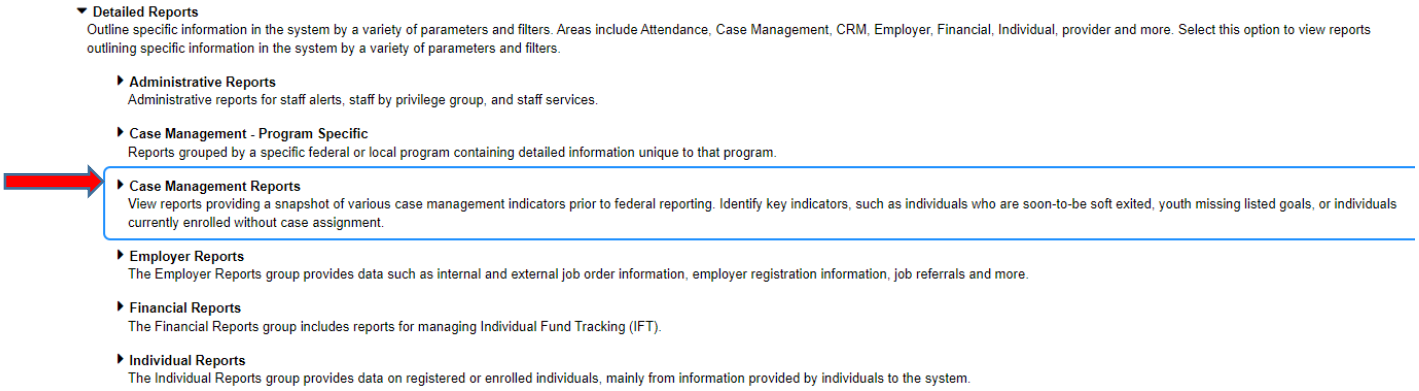
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



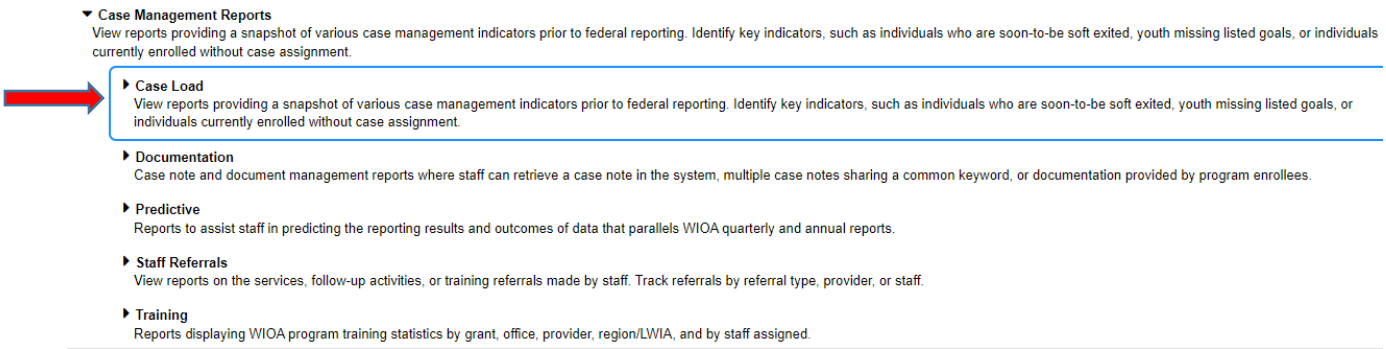
2. Click on the arrow next to "Detailed Reports" to expand:



3. Click on the arrow next to "Case Management Reports" to expand:



4. Click on the arrow next to "Case Load" to expand:



5. Click on "Exited Cases":

Case Management Reports

View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

Case Load

View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

Case Load

- Active Cases
- Application
- Assigned Case Load
- Case Closure Information
- Case Summary By Application Date
- Co-Enrollment Summary
- Credentials Required
- Eligibility Enrollments
- Enrollment Summary By LWIA
- Exited Cases
- Hourly Wage Before and After Enrollment
- Measurable Skill Gains
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Staff Assisted Summary
- Summary
- Veteran Data Discrepancies
- Active Enrollment
- Assessment of Educational Functioning Levels
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Customer Groups
- Credentials
- Days since Last Active Service
- Enrollment in Homeless Veterans Reintegration Program
- Exit Reason Summary
- Expiring Work Authorization
- Individual Disability
- Measurable Skill Gains Required
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Staff Caseload by Program and Status
- Targeted Measurable Skill Gain

6. Select the appropriate parameters for the report:

- Program is "SNAP Employment and Training" and Customer Group is "SNAP E and T":

Program

Program: SNAP Employment and Training

Customer Group: None Selected; SNAP E and T

- You can select Region and Office Location or leave None Selected to pull the entire state:

Location

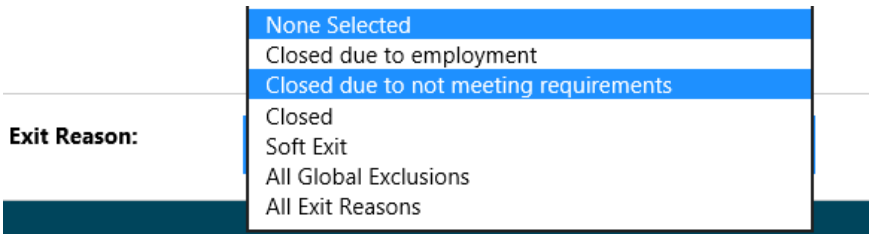
Region/LWDB Status: Active Inactive All

Region/LWDB: None Selected; Central Region; East Jackson County; Jefferson/Franklin Consortium

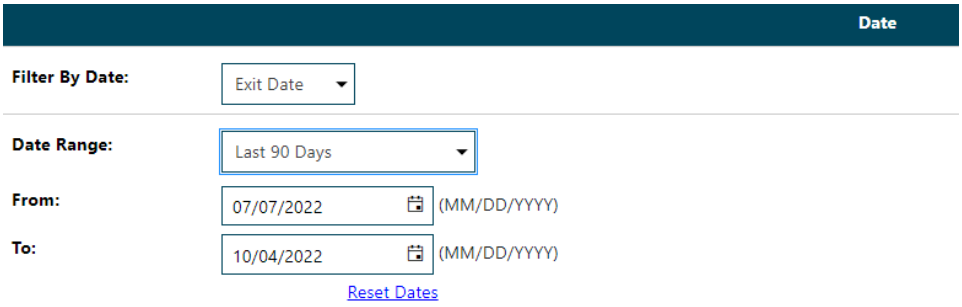
Office Status: Active Inactive All

Office Location: None Selected

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



- Enter the date parameters:



- Click Run Report

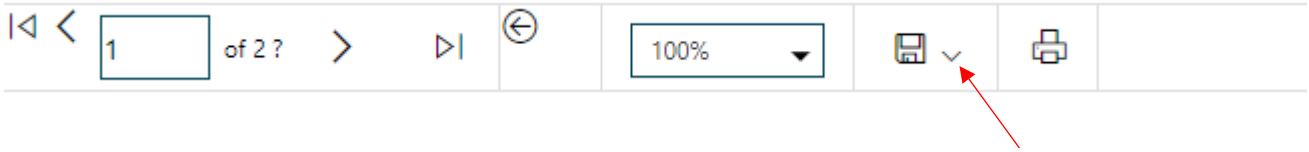
7. Your report results will display based on filter criteria selected:

Case Management Reports - Exited Cases Report

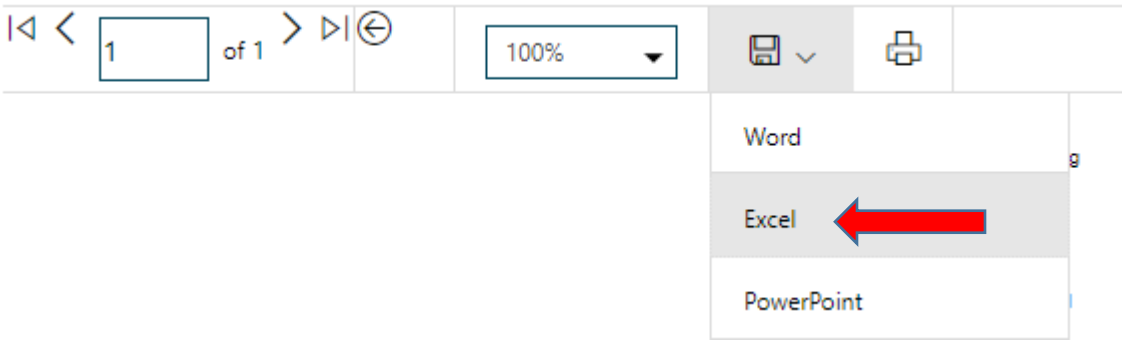
Program: SNAP Employment and Training
Customer Group: SNAP E and T
Filter By Date: Exit Date
Date Range: 7/7/2022 - 10/4/2022
Report Run Time: 10/4/2022 10:24:38 AM

Last Name	First Name	Date of Birth	App	State ID	LWIA	Office	Program Name	Case Manager	Create Date	IEP Status	Exit Date	Employment Exit Reason	Exit Reason	Participation Type
		11/01/2000			St. Louis County	ST. LOUIS COUNTY - NORTHWEST CROSSING	SNAP Employment and Training		10/02/2022	Open	10/01/2022		Closed due to employment	Voluntary
		01/01/1992			St. Louis City	ST. LOUIS CITY - SLATE JOB CENTER	SNAP Employment and Training		10/02/2022	Open	10/01/2022		Closed	Voluntary
		07/13/1962			South Central Region	POPLAR BLUFF JOB CENTER	SNAP Employment and Training		09/02/2022	Open	09/01/2022		Closed	Voluntary
		03/16/1988			Ozark Region	SPRINGFIELD JOB CENTER	SNAP Employment and Training		10/02/2022	Open	10/01/2022		Closed due to employment	Voluntary

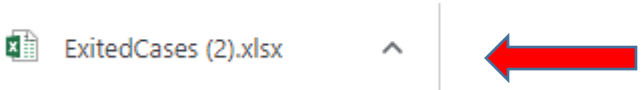
8. To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:



9. Click on Excel:



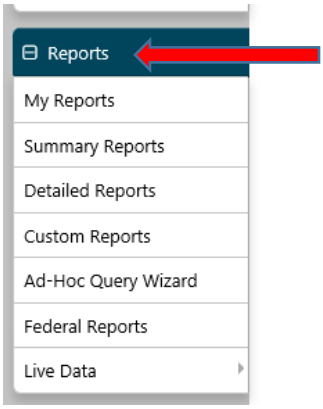
10. Click on the document on the taskbar to open/save the spreadsheet:



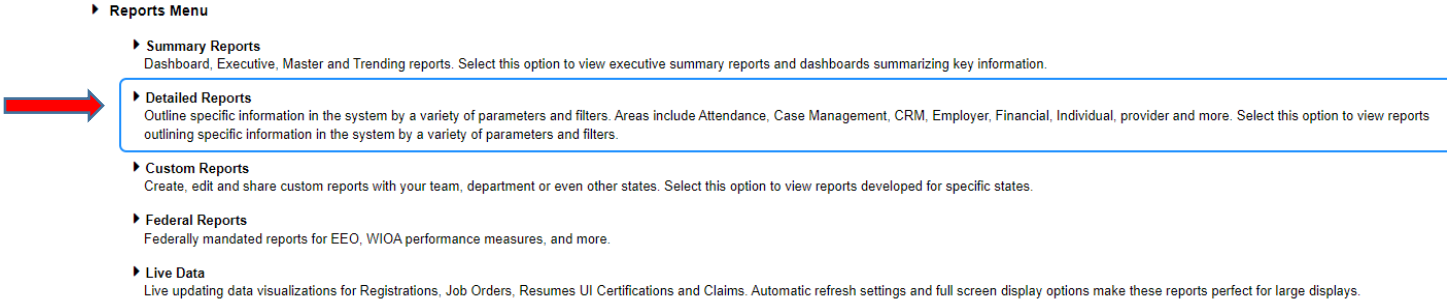
Projected Begin Dates

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

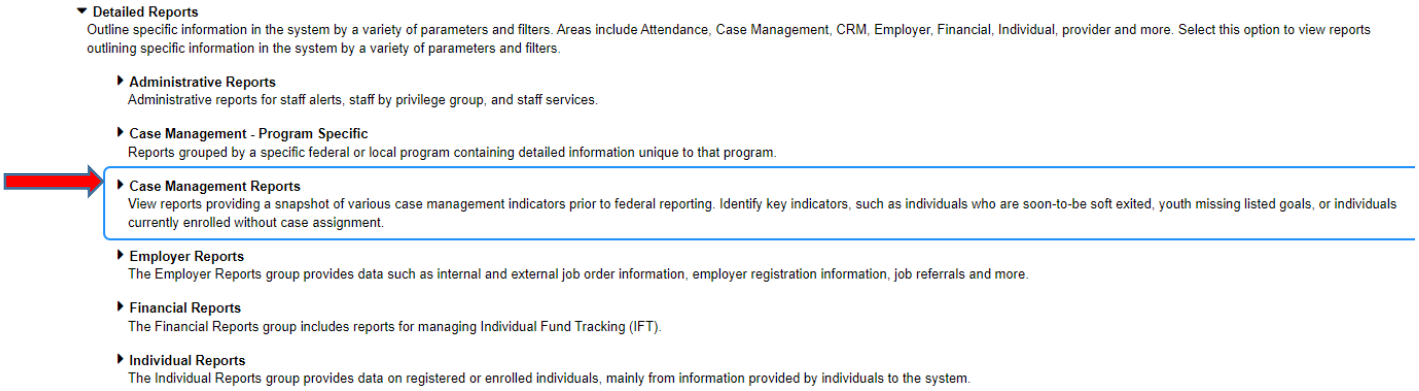
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



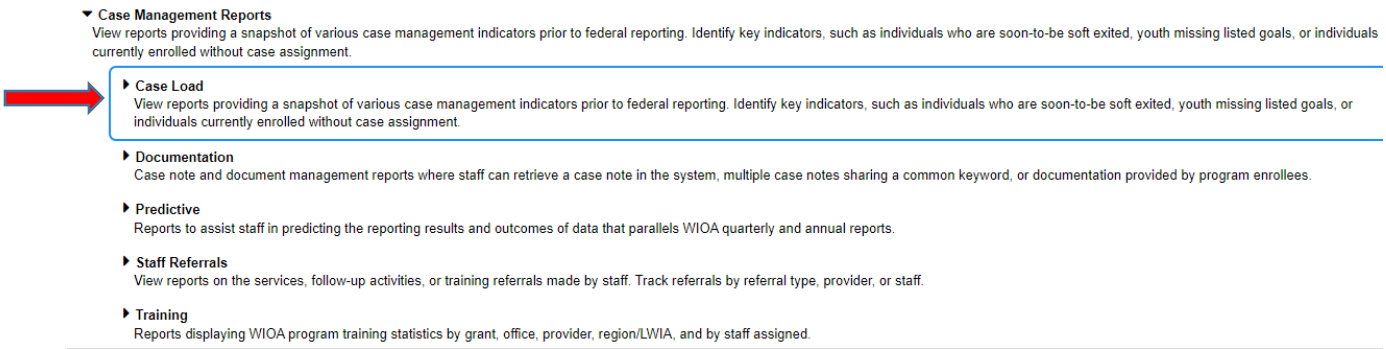
2. Click on the arrow next to "Detailed Reports" to expand:



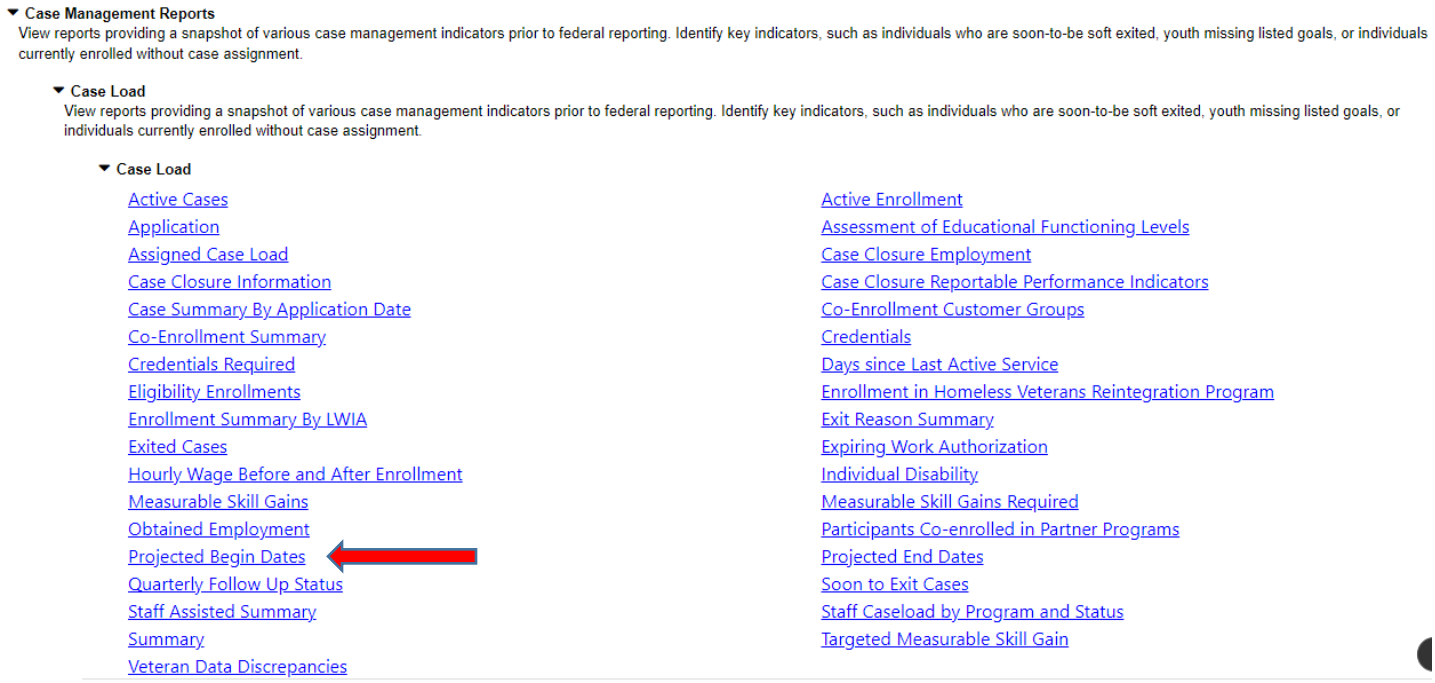
3. Click on the arrow next to "Case Management Reports" to expand:



4. Click on the arrow next to "Case Load" to expand:

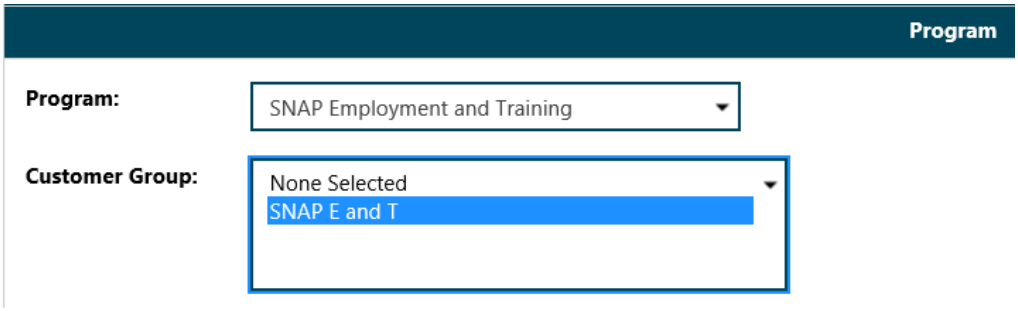


5. Click on "Projected Begin Dates":

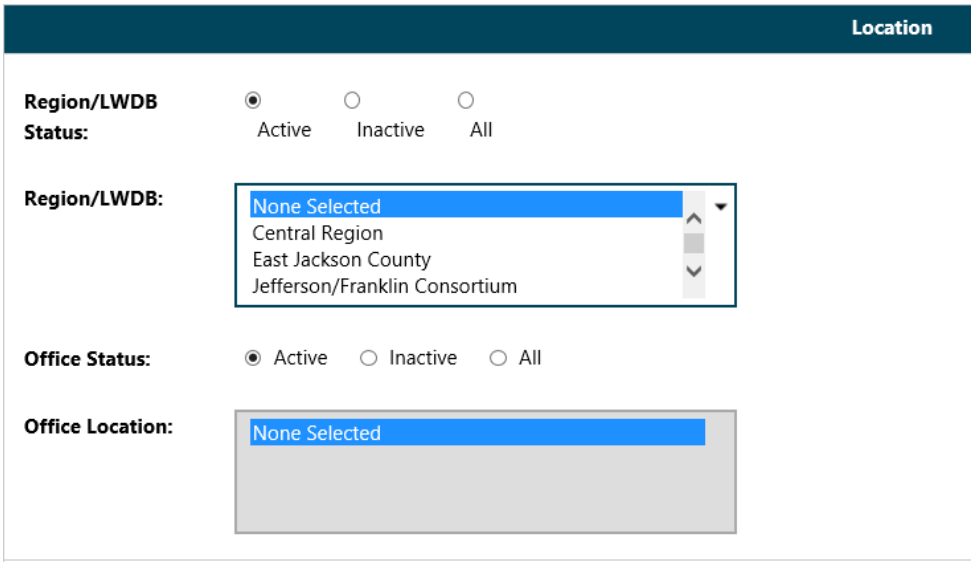


6. Select the appropriate parameters:

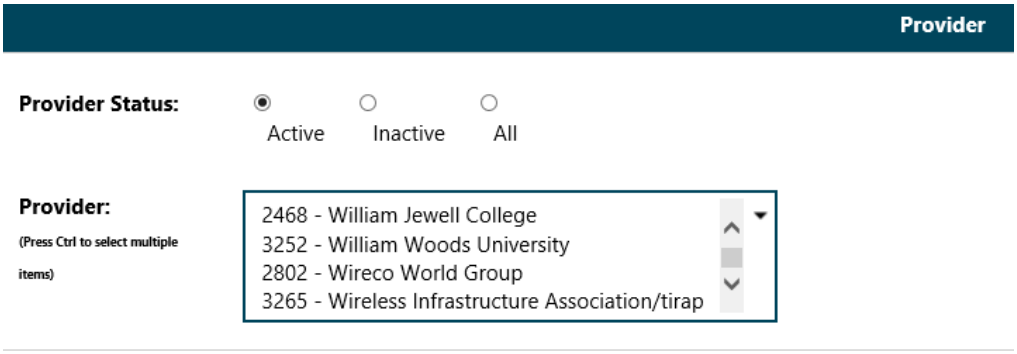
- Program is "SNAP Employment and Training", Group is "SNAP E and T":



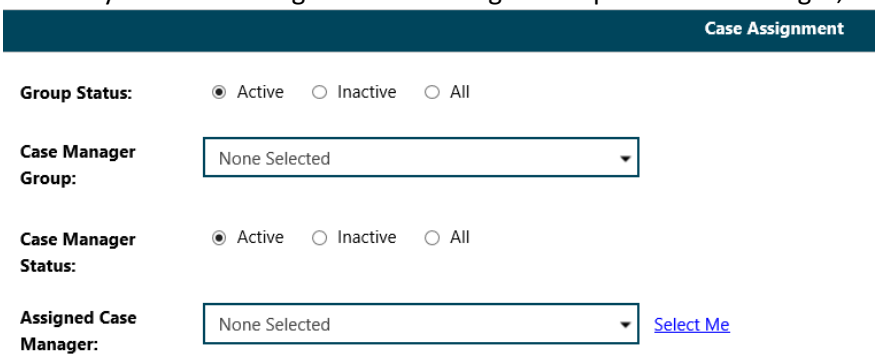
- Select the Region and Office Location or leave "None Selected" to pull the entire state:



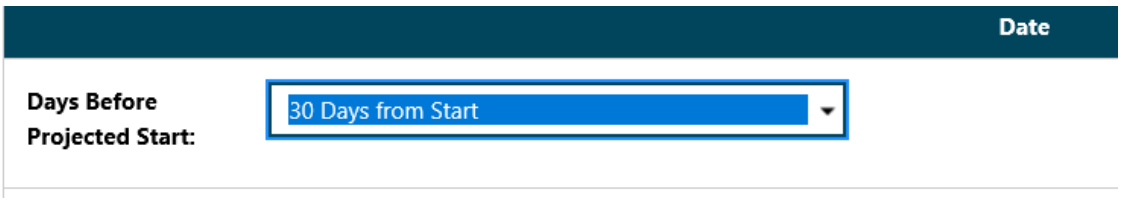
- Staff may select the Provider for the upcoming training, if desired:



- Staff may select the Assigned Case Manager Group and Case Manager, if desired:



- Select the Date parameter



- Click Run Report

7. **Your report results will display based on filter criteria selected:**

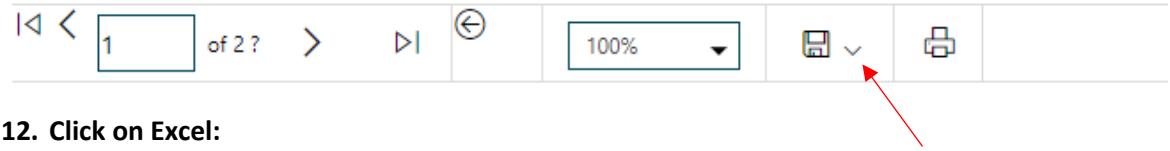
Case Management Reports - Projected Begin Dates

Program: SNAP Employment and Training
Customer Group: SNAP E and T
Days From Projected Start: 30
Report Run Time: 10/4/2022 11:26:58 AM

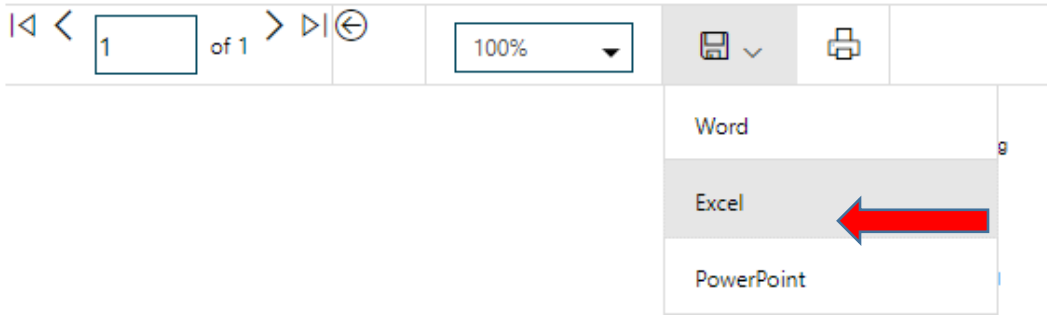
03 - Kansas City & Vicinity

Kansas City & Vicinity								
Name:			Username:	State ID:	App ID:		Assigned Case Manager:	
Activity Code	Cust Grp Code	Participation Type	Office	Provider of Service	Projected Begin	Actual Begin	Last Edit	Staff Assigned
141		Voluntary	KANSAS CITY - FEC JOB CENTER	QuikTrip Corporation	10/4/2022	10/4/2022	10/4/2022	
Name:			Username:	State ID:	App ID:		Assigned Case Manager:	
Activity Code	Cust Grp Code	Participation Type	Office	Provider of Service	Projected Begin	Actual Begin	Last Edit	Staff Assigned
361		Voluntary	FSD Partner Southeast	Mineral Area College, Park Hills	10/11/2022		9/19/2022	
Name:			Username:	State ID:	App ID:		Assigned Case Manager:	
Activity Code	Cust Grp Code	Participation Type	Office	Provider of Service	Projected Begin	Actual Begin	Last Edit	Staff Assigned
361		Voluntary	FSD Partner Southeast	Mineral Area College, Park Hills	10/11/2022		9/19/2022	

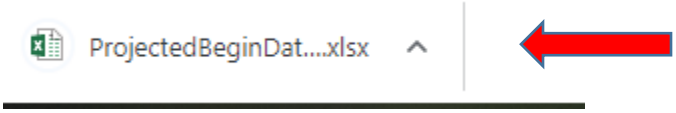
11. **To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:**



12. **Click on Excel:**



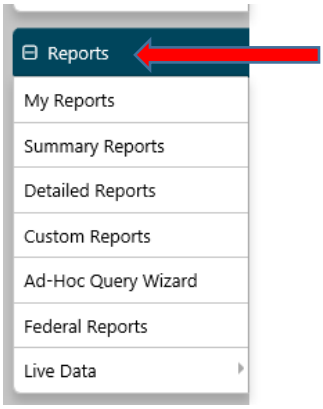
13. **Click on the document on the taskbar to open/save the spreadsheet:**



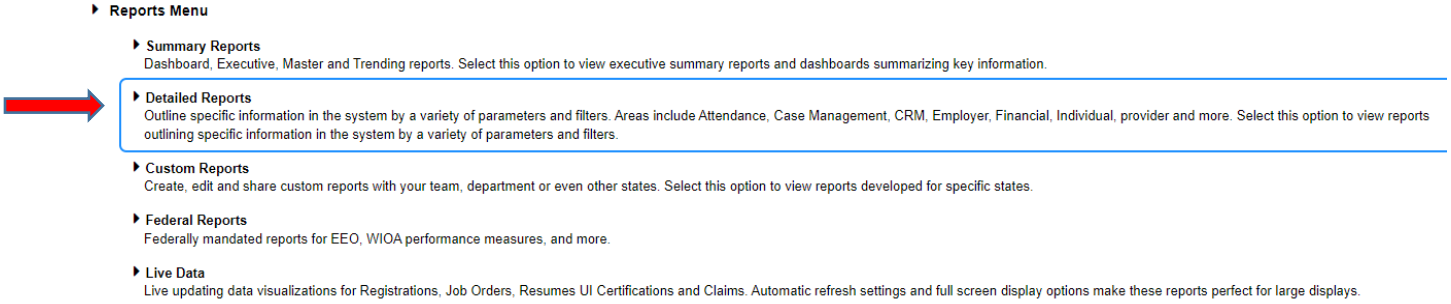
Projected End Dates

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

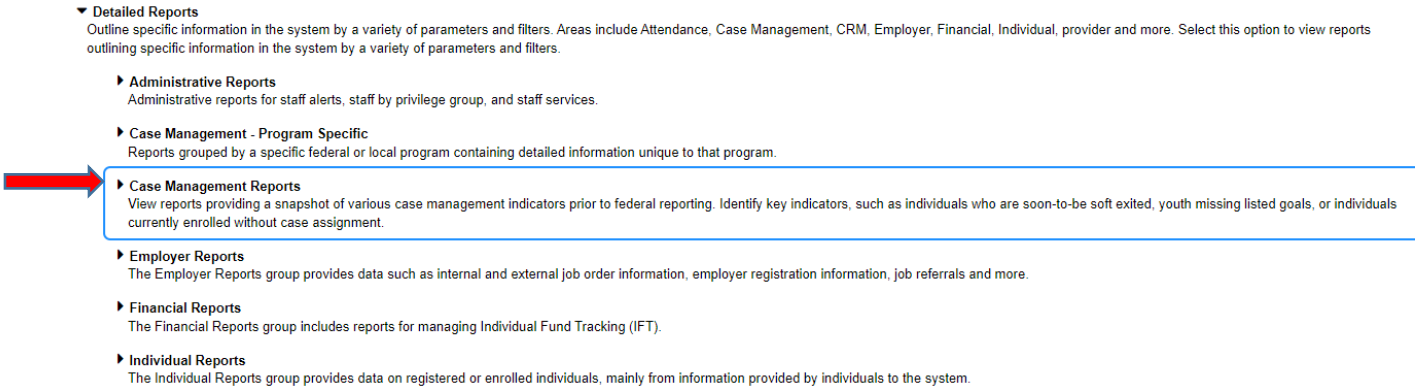
1. Click on "Reports" in the Left Navigation Bar; you will be directed to the Reports page:



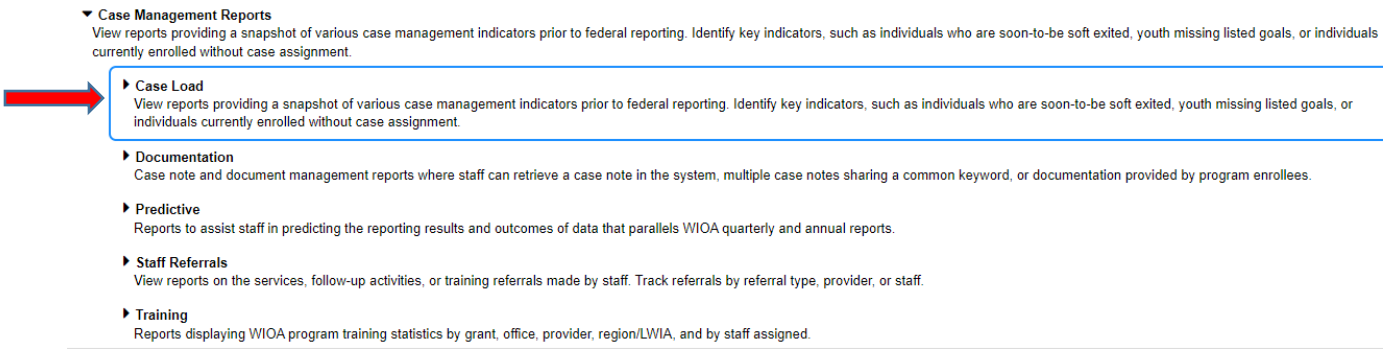
2. Click on the arrow next to "Detailed Reports" to expand:



3. Click on the arrow next to "Case Management Reports" to expand:



4. Click on the arrow next to "Case Load" to expand:



5. Click on "Projected End Dates":

Case Management Reports

View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

Case Load

View reports providing a snapshot of various case management indicators prior to federal reporting. Identify key indicators, such as individuals who are soon-to-be soft exited, youth missing listed goals, or individuals currently enrolled without case assignment.

Case Load

- Active Cases
- Application
- Assigned Case Load
- Case Closure Information
- Case Summary By Application Date
- Co-Enrollment Summary
- Credentials Required
- Eligibility Enrollments
- Enrollment Summary By LWIA
- Exited Cases
- Hourly Wage Before and After Enrollment
- Measurable Skill Gains
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow Up Status
- Staff Assisted Summary
- Summary
- Veteran Data Discrepancies
- Active Enrollment
- Assessment of Educational Functioning Levels
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Customer Groups
- Credentials
- Days since Last Active Service
- Enrollment in Homeless Veterans Reintegration Program
- Exit Reason Summary
- Expiring Work Authorization
- Individual Disability
- Measurable Skill Gains Required
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Staff Caseload by Program and Status
- Targeted Measurable Skill Gain

6. Select the appropriate parameters:

- Program is "SNAP Employment and Training", Group is "SNAP E and T":

Program

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

Location

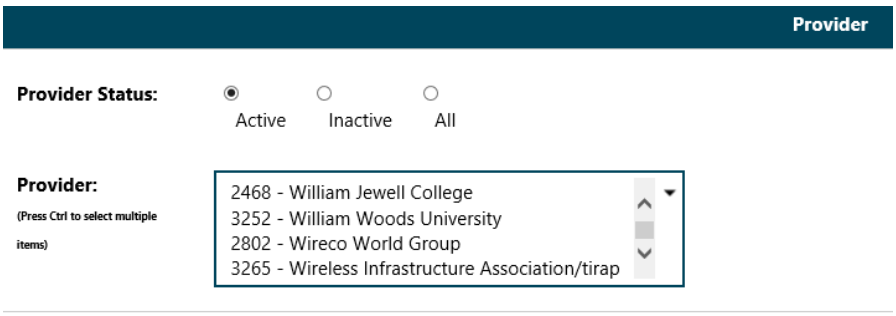
Region/LWDB Status: Active Inactive All

Region/LWDB: None Selected / Central Region / East Jackson County / Jefferson/Franklin Consortium

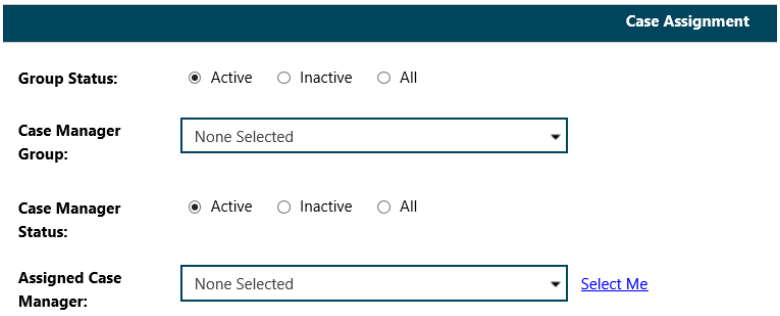
Office Status: Active Inactive All

Office Location: None Selected

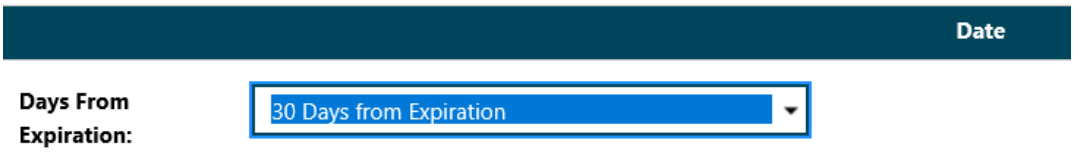
❖ Staff may select the Provider for the upcoming training, if desired:



❖ Staff may select the Assigned Case Manager Group and Case Manager, if desired:



❖ Select the Date parameter:



❖ Click Run Report:

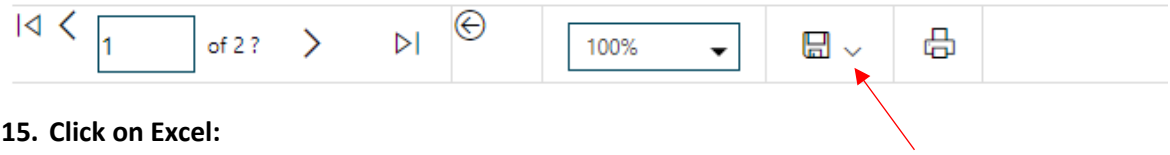
7. **Your report results will display based on filter criteria selected:**

Case Management Reports - Projected End Dates

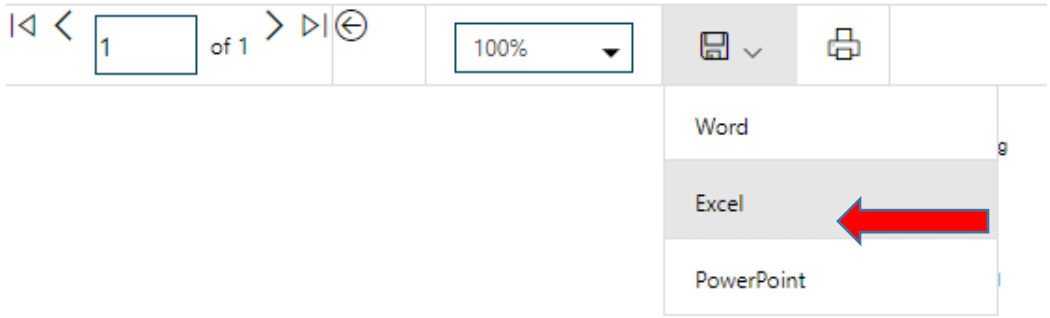
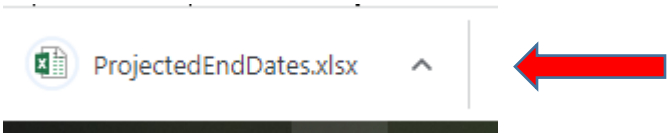
Days From Expire: 30
Report Run Time: 10/4/2022 11:44:34 AM

06 - St. Louis City							
Name:		Username:	State ID:	App ID:		Assigned Case Manager:	
Activity Code	Cust Grp Code	Office	Provider of Service	Actual Begin	Projected End	Last Edit	Last Edited By
300	17	ST. LOUIS CITY - SLATE JOB CENTER		10/3/2022	11/3/2022	10/3/2022	/
Name:		Username:	State ID:	App ID: 6		Assigned Case Manager:	
Activity Code	Cust Grp Code	Office	Provider of Service	Actual Begin	Projected End	Last Edit	Last Edited By
300	20	ST. LOUIS COUNTY - NORTHWEST CROSSING	Nexul Academy	5/16/2022	10/12/2022	9/27/2022	
Name:		Username:	State ID:	App ID:		Assigned Case Manager:	
Activity Code	Cust Grp Code	Office	Provider of Service	Actual Begin	Projected End	Last Edit	Last Edited By
314	20	ST. LOUIS COUNTY - NORTHWEST CROSSING	Washington University In St. Louis	6/22/2022	11/1/2022	8/5/2022	\

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



15. Click on Excel:



16. Click on the document on the taskbar to open/save the spreadsheet: