

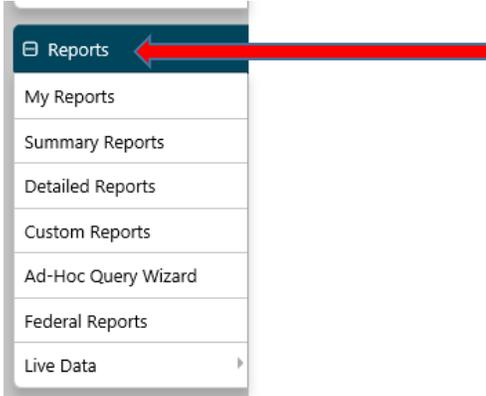
SkillUP Report User Guide

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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:

▶ Reports Menu

▶ Summary Reports

Dashboard, Executive, Master and Trending reports. Select this option to view executive summary reports and dashboards summarizing key information.

▶ 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.

▶ Custom Reports

Create, edit and share custom reports with your team, department or even other states. Select this option to view reports developed for specific states.

▶ Federal Reports

Federally mandated reports for EEO, WIOA performance measures, and more.

▶ Live Data

Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

3. Scroll down under “Detailed Reports” until you see “Services Reports” and Click on the arrow next to it 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 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.

▶ Provider Reports

Reports displaying information about provider institutions, their programs, and contacts.

▶ Services Reports

View reports providing data on staff-provided services to either individuals or employers.

▶ Staff Efficiency & Tracking Reports

Track services associated with events, system measures, messaging, and survey results.

4. Click the arrow next to “Services Provided Individual” Report to expand:

▼ Services Reports

View reports providing data on staff-provided services to either individuals or employers.

▶ Services Provided Employer

View reports displaying information on the services provided by staff to employers.

▶ Services Provided Individual

View reports displaying information, by program, on the services provided by staff to individuals.

5. Click on “by Provider” under the “Service” section:

▼ Services Provided Individual

View reports displaying information, by program, on the services provided by staff to individuals.

▼ Service

[List](#)

[by Activity Completion Status](#)

[by County](#)

[by Disabled Veteran Status](#)

[by Education Level](#)

[by Ethnicity](#)

[by Grant](#)

[by MSFW Status](#)

[by Potential Eligibility for Veteran Benefits](#)

[by Race](#)

[by Selective Service](#)

[by Services](#)

[by Staff Assigned](#)

[by Staff Reported](#)

[by Veteran SBE](#)

[by Work Status](#)

[by Access Location](#)

[by Age](#)

[by Disability Status](#)

[by Discharge Status](#)

[by Enrollment Characteristics](#)

[by Gender](#)

[by Individual](#)

[by Office](#)

[by Provider](#)

[by Region/LWIA](#)

[by Service Assistance Type](#)

[by Services with Rapid Response Event](#)

[by Staff Edit](#)

[by Veteran Campaign Status](#)

[by Veteran Status](#)

[by Zip Code](#)

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

Selection Criteria	
Program	
Program:	<div style="border: 1px solid black; padding: 5px;"><p>Apprenticeship (APR)</p><p>SNAP Employment and Training</p><p>Title I - Workforce Development (WIOA)</p><p>Trade Adjustment Assistance (TAA)</p></div>
Customer Group:	<div style="border: 1px solid black; padding: 5px;"><p>None Selected</p><p>SNAP E and T</p></div>

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:

Location

Region/LWDB Status: Active Inactive All

Region/LWDB: (Press Ctrl to select multiple items)

None Selected
Central Region
East Jackson County
Jefferson/Franklin Consortium



Office Status: Active Inactive All

Office Location:

None Selected

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:

Staff

Staff Assigned: 

Staff Position Status: Active Inactive All

Position:

None Selected
Staff
LVER (WWS)
DVOP (VESS)

Status: Active Inactive All

Search By: Last Name First Name UserName

Staff:

None Selected

[Add](#) [Remove](#)

Staff Created: 

Staff Position Status: Active Inactive All

Position:

None Selected
Staff
LVER (WWS)
DVOP (VESS)

Search Status: Active Inactive All

Search By: Last Name First Name UserName

Staff:

None Selected

Staff Selected: [Add](#) [Remove](#)

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.

Date

Date Filter: 

Date Range: 

From:  (MM/DD/YYYY)

To:  (MM/DD/YYYY)

[Reset Dates](#)



10. The Services Provided Individual – Provider report appears

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

Staff Email Search 

Navigation: 1 of 2?  100% 

Services Provided Individuals - Provider

Program: SNAP Employment and Training
 LMA 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%
180 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%
Medcoerts, 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%
Tdda, Llc D/b/a Truck Dynasty Driving Academy	1	1	0.02%
Green Hills RPC	4	25	0.48%
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 WQA	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-Laorange 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:

Navigation: 1 of 2 ? 75%

Services Provided Individuals - List Report
 Provider: Southern MO Works Project - SkillUP
 Program: SNAP Employment and Training
 LWA Record Set Location: Activity Record
 State Region: State Region 1
 Version Information From: Both
 Date Field: Create Date
 Start Date: 7/1/2022
 End Date: 9/30/2022

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 (EPHS&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	510 - 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 (EPHS&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 (TRIS)			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:

Navigation: 1 of 2 ? 100%

Save icon with dropdown arrow highlighted by a red arrow.

14. Click on Excel:

Navigation: 1 of 2 ? 100%

Export menu with 'Excel' highlighted by a red arrow.

- Word
- Excel
- PowerPoint
- PDF

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

Taskbar: List (8).xlsx

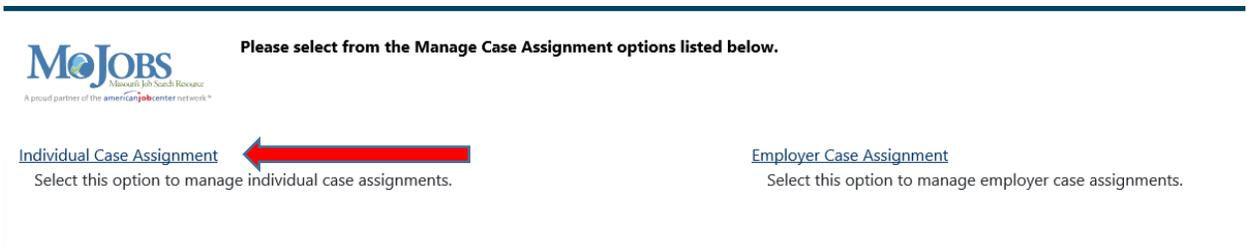
Document icon highlighted by a red arrow.

View Case Load by Case Manager

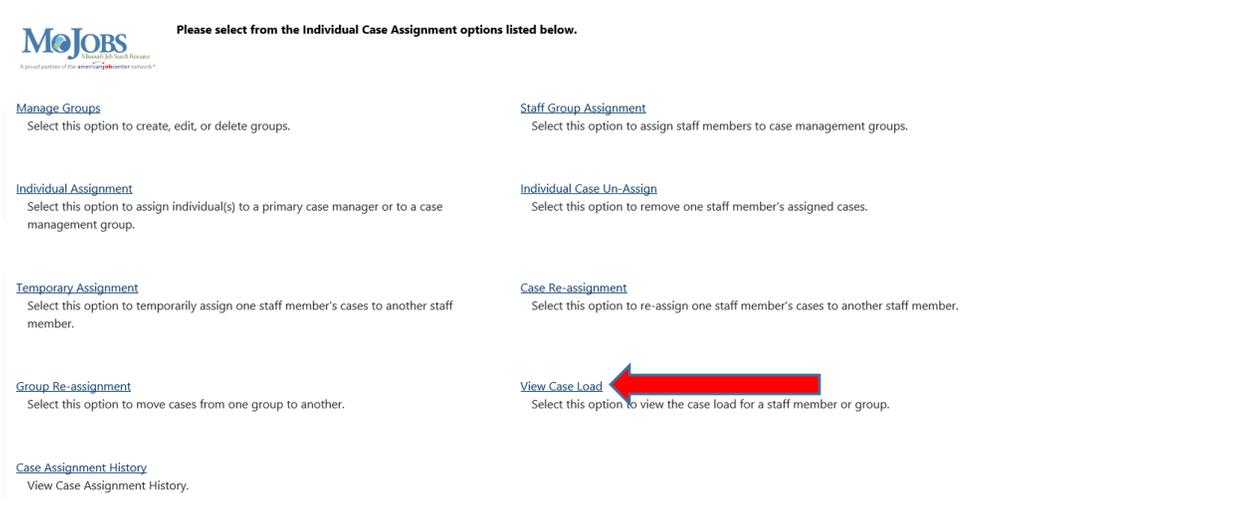
1. Click on “Manage Case Assignment” in the left navigation bar:



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.

[Hide Filter Criteria](#)

Filter Criteria

Select a Group Name: None Selected 

Cases Displayed: All Only Active

Display: All Yours

Show only closed never enrolled applications: No, show all Yes, only closed never enrolled

Show Staff As: All Active Inactive

* LWIA Region: None Selected  

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
ivan	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](#)

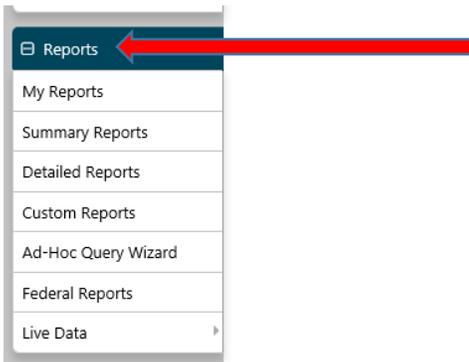
To sort on any column, click a column title. Current Sort: *Name ascending*

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:

▶ Reports Menu

- ▶ **Summary Reports**
Dashboard, Executive, Master and Trending reports. Select this option to view executive summary reports and dashboards summarizing key information.
- ▶ **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.
- ▶ **Custom Reports**
Create, edit and share custom reports with your team, department or even other states. Select this option to view reports developed for specific states.
- ▶ **Federal Reports**
Federally mandated reports for EEO, WIOA performance measures, and more.
- ▶ **Live Data**
Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

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.

4. Click on “Active Cases”:

Case Load:

Advanced

- [Active Cases](#)
- [Application](#)
- [Case Closure Employment](#)
- [Case Closure Reportable Performance Indicators](#)
- [Co-Enrollment Summary](#)
- [Days since Last Active Service](#)
- [Enrollment Summary By LWIA](#)
- [Exited Cases](#)
- [Hourly Wage Before and After Enrollment](#)
- [Obtained Employment](#)
- [Projected Begin Dates](#)
- [Quarterly Follow Up Status](#)
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- [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](#)

5. Choose the appropriate parameters:

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

Report Type

Report Type:

- ❖ Select “SNAP Employment and Training” for the Program and “SNAP E and T” for the Customer Group:

Program

Program:

Customer Group:

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

Location

Region/LWDB Status: Active Inactive All

Region/LWDB:
East Jackson County
Jefferson/Franklin Consortium
Kansas City & Vicinity

Office Status: Active Inactive All

Office Location:
FAMILY SUPPORT DIVISION
FORT LEONARD WOOD VET CENTER
FRDC - Fulton Reception & Diagnostic Center

- ❖ 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:

Case Assignment

Group Status: Active Inactive All

Case Manager Group:

Case Manager Status: Active Inactive All

Assigned Case Manager: [Select Me](#)

- ❖ Finally, select the *desired* date range and Click Run Report:

Date

Date Range:

From:

To:

[Reset Dates](#)



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

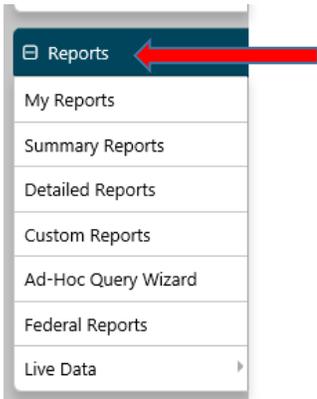
Office/Location	Assigned Staff	Active Cases	Closed Cases	Exit Cases
FSD Partner Central		1	0	0
FSD Partner Central		1	0	0
FSD Partner Central		6	0	0
FSD Partner Central		45	0	5
Total:		53	0	5

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:

▶ **Reports Menu**

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Create, edit and share custom reports with your team, department or even other states. Select this option to view reports developed for specific states.
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Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

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

▼ **Detailed Reports**
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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 “Days since Last Active Service”

▼ 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](#)

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[Participants Co-enrolled in Partner Programs](#)

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[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

Program

Program:

SNAP Employment and Training

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

Location

State Region:

State Region 1

Region/LWDB Status:

Active Inactive All

Region/LWDB:

(Press Ctrl to select multiple items)

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

Office Status:

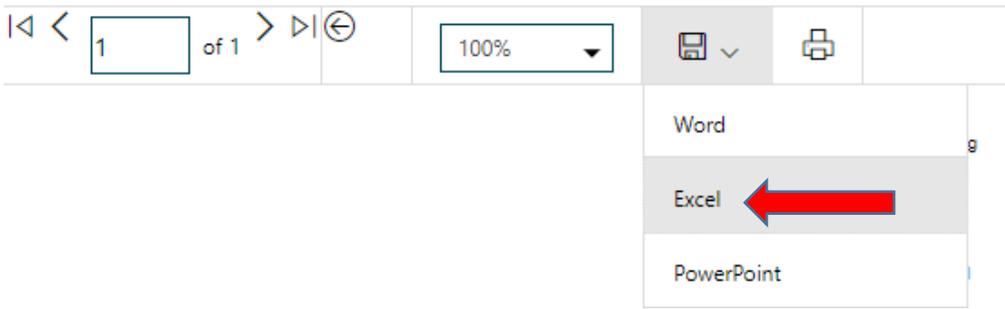
Active Inactive All

Office Location:

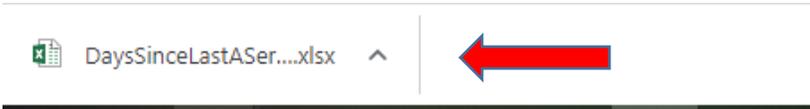
(Press Ctrl to select multiple items)

MERS/GOODWILL - WASHINGTON COUNTY
P AND P DISTRICT 11 - ROLLA
P AND P DISTRICT 11S - STEELVILLE
FSD Partner Ozark

9. Click on Excel:



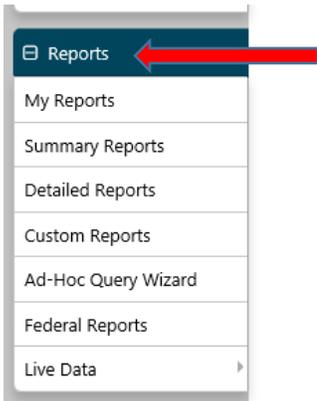
10. Click on the document on the taskbar to open/save the spreadsheet:



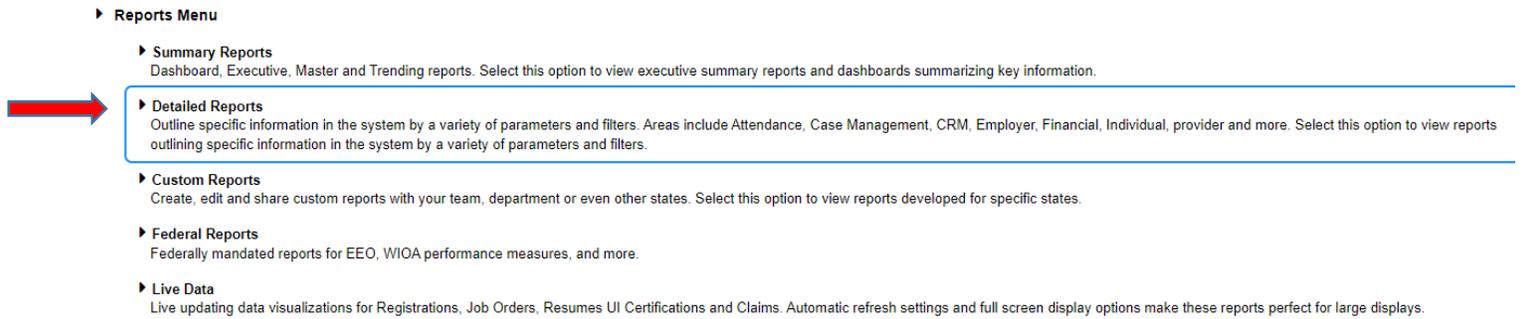
Obtained Employment

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](#)

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[Projected Begin Dates](#)

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[Assessment of Educational Functioning Levels](#)

[Case Closure Employment](#)

[Case Closure Reportable Performance Indicators](#)

[Co-Enrollment Customer Groups](#)

[Credentials](#)

[Days since Last Active Service](#)

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[Individual Disability](#)

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[Participants Co-enrolled in Partner Programs](#)

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[Staff Caseload by Program and Status](#)

[Targeted Measurable Skill Gain](#)

6. Select the parameters for the report:

- ❖ Program is SNAP Employment and Training

Program

Program: None Selected
Title III - Wagner-Peyser (WP)
Apprenticeship (APR)
SNAP Employment and Training

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

Location

Region/LWDB Status: Active Inactive All

Region/LWDB: Central Region
East Jackson County
Jefferson/Franklin Consortium
Kansas City 8th/10th

Office Status: Active Inactive All

Office Location: None Selected
ALGOA CORRECTIONAL CTR DIST 27
BOONVILLE CORRECTIONAL CTR DIST 6
CAPITAL CITY JOB CENTER

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

Geographic

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 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: 07/07/2022 (MM/DD/YYYY)

To: 10/04/2022 (MM/DD/YYYY)

[Reset Dates](#)

❖ Click Run Report

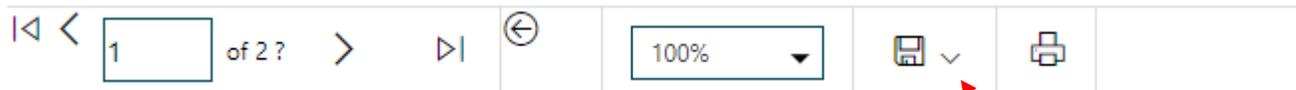
Run Report

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

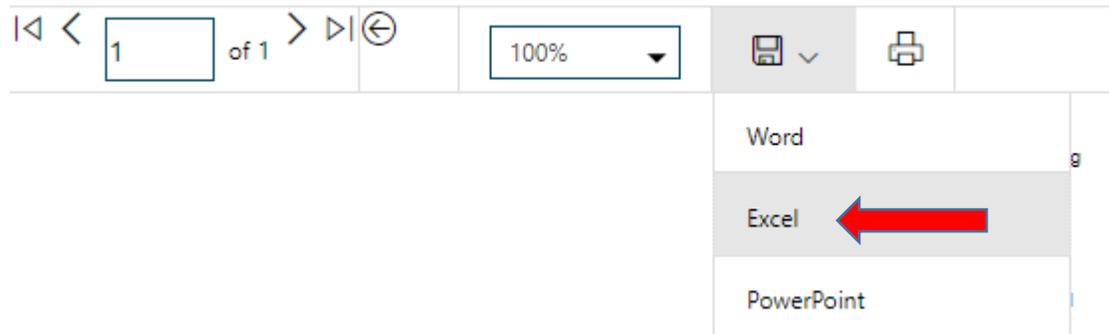
Obtained Employment
 Program: SNAP Employment and Training
 State: MD
 From: 1/1/2022 to 10/4/2022
 Report Run Time: 10/4/2022 2:38:33 AM

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	Hrs Wage	ONET	Training Related	Apprenticeship	Industry	Page Reported	Participation Type
SNAP					05/20/2022		34	Female	Asian, White	85101	FSD Partner Center	One Call Concepts Inc	624 Weathered Rock Rd	Jafferson City	MD	85101	customer care	03/01/2022		40	\$14.00	4340102 - Customer Service Representatives	Relationship of employment to training cannot be determined.	No	561300 - All Other Support Services	nt	Voluntary
SNAP					06/01/2022		35	Female	White	61000	FSD Partner Center	Two Sult	610 S. High St	Palmer	MD	61004	Club Member	07/04/2022	06/20/2022	30	\$11.15	5301000 - Fast Food and Counter Workers	Relationship of employment to training cannot be determined.	No	722913 - Limbic Service Professionals	nt	Voluntary
SNAP					10/12/2021		28	Female	African American/Black	60202	MARY MCCORMILL EXCEL CENTER - COLUMBIA	Nanny's Early Learning Center	404 Midstate Avenue	Columbia	MD	60203	teacher	07/21/2022		20	\$13.00	2801100 - Childcare Workers	Relationship of employment to training cannot be determined.	No	624410 - Child Day Care Services	nt	Voluntary

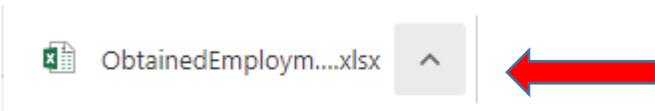
8. To export the data to an Excel Spreadsheet click on the arrow next to the Save Icon:



9. Click on Excel:



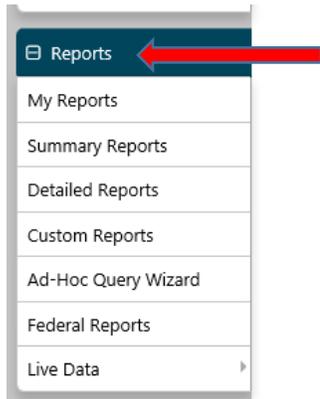
10. Click on the document on the taskbar to open/save the spreadsheet:



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:

▶ Reports Menu

▶ Summary Reports

Dashboard, Executive, Master and Trending reports. Select this option to view executive summary reports and dashboards summarizing key information.

▶ 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.

▶ Custom Reports

Create, edit and share custom reports with your team, department or even other states. Select this option to view reports developed for specific states.

▶ Federal Reports

Federally mandated reports for EEO, WIOA performance measures, and more.

▶ Live Data

Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

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 “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

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[Case Closure Employment](#)

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[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:

Customer Group:

- ❖ 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:

Office Status: Active Inactive All

Office Location:

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

Exit Reason:

- None Selected
- Closed due to employment
- Closed due to not meeting requirements
- Closed
- Soft Exit
- All Global Exclusions
- All Exit Reasons

- ❖ Enter the date parameters:

Date

Filter By Date: Exit Date

Date Range: Last 90 Days

From: 07/07/2022 (MM/DD/YYYY)

To: 10/04/2022 (MM/DD/YYYY)

[Reset Dates](#)

- ❖ Click Run Report

Run Report

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

Case Management Reports - Exited Cases Report

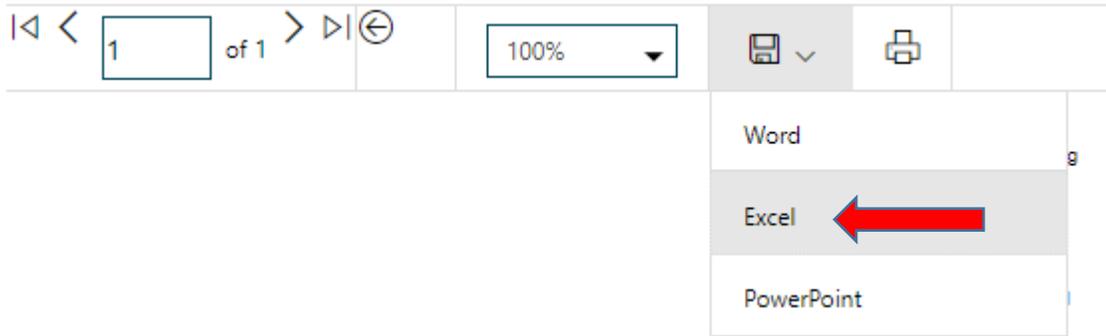
Program: SNAP Employment and Training
 Customer Group: SNAP E and T
 Filter By Date: Exit Date
 Date Range: 7/7/2022 - 10/4/2022
 Report Run Time: 10/4/2022 10:24:38 AM

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
		07/13/1982			South Central Region	POPLAR BLUFF JOB CENTER	SNAP Employment and Training		09/02/2022	Open	09/01/2022		Closed	Voluntary
		03/18/1988			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:

Navigation icons: Previous, Next, Page 1 of 2, Refresh, Zoom 100%, Save (with dropdown arrow), Print.

9. Click on Excel:



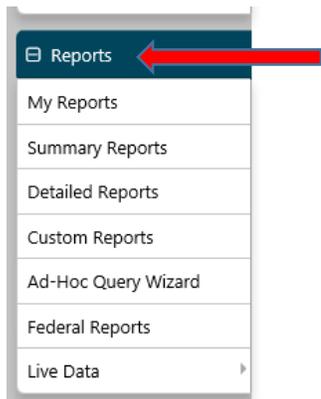
10. Click on the document on the taskbar to open/save the spreadsheet:



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:

▶ Reports Menu

▶ Summary Reports

Dashboard, Executive, Master and Trending reports. Select this option to view executive summary reports and dashboards summarizing key information.

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▶ Federal Reports

Federally mandated reports for EEO, WIOA performance measures, and more.

▶ Live Data

Live updating data visualizations for Registrations, Job Orders, Resumes UI Certifications and Claims. Automatic refresh settings and full screen display options make these reports perfect for large displays.

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.

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▶ Employer Reports

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▶ 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 “Projected Begin 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

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[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:

Customer Group:

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

Location

Region/LWDB Status: Active Inactive All

Region/LWDB:

Office Status: Active Inactive All

Office Location:

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

Provider

Provider Status: Active Inactive All

Provider:
(Press Ctrl to select multiple items)

2468 - William Jewell College

3252 - William Woods University

2802 - Wireco World Group

3265 - Wireless Infrastructure Association/tirap

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

Case Assignment

Group Status: Active Inactive All

Case Manager Group:

Case Manager Status: Active Inactive All

Assigned Case Manager: [Select Me](#)

- ❖ Select the Date parameter

Date

Days Before Projected Start:

- ❖ Click Run Report

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

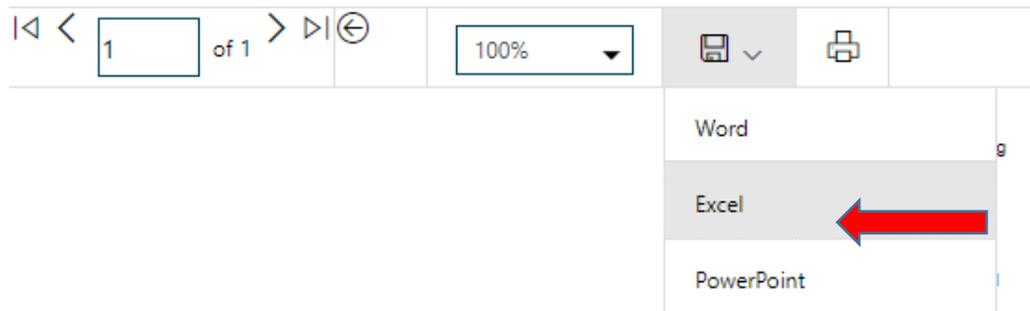
03 - Kansas City & Vicinity

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:



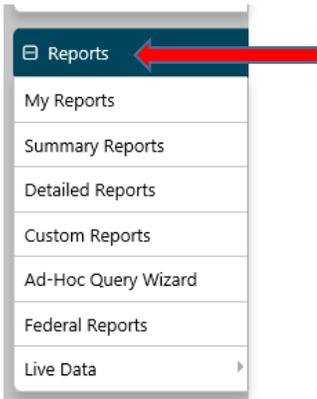
13. Click on the document on the taskbar to open/save the spreadsheet:



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:

▶ Reports Menu

▶ Summary Reports

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

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▶ 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 “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:

Customer Group:

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

Location

Region/LWDB Status: Active Inactive All

Region/LWDB:

Office Status: Active Inactive All

Office Location:

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

Provider

Provider Status: Active Inactive All

Provider:
(Press Ctrl to select multiple items)

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

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

Case Assignment

Group Status: Active Inactive All

Case Manager Group:

Case Manager Status: Active Inactive All

Assigned Case Manager: [Select Me](#)

❖ Select the Date parameter:

Date

Days From Expiration:

❖ Click Run Report:

Run Report

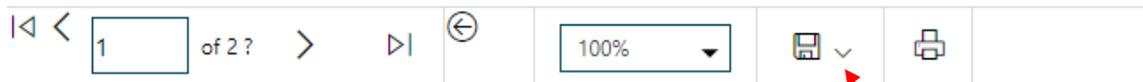
7. Your report results will display based on filter criteria selected:

Case Management Reports - Projected End Dates

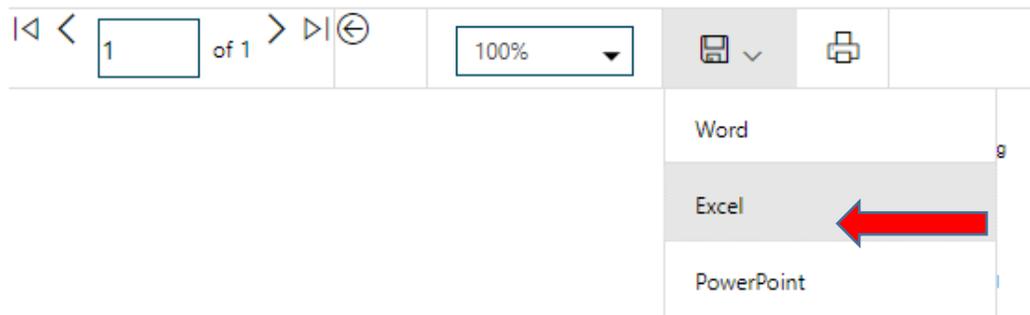
Days From Expire: 30
Report Run Time: 10/4/2022 11:44:34 AM

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:

