

CalJOBSSM Reports

Participant case management and performance related reports



Welcome to CalJOBS Reports training. We will cover some useful participant reports that may assist in case management.

Reports

- Enrolled Individuals
- Services Provided Individuals
- Measureable Skill Gains
- Credentials
- Case Closure Reportable Performance Indicators
- Individual Case Notes
- Saving to My Reports

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We will review the following reports:

- Enrolled Individuals
- Services Provided Individuals
- Measureable Skill Gains
- Credentials
- Case Closure Reportable Performance Indicators
- Individual Case Notes
- Saving to My Reports

Report Filters

Program

Program: Workforce Innovation and Opportunity Act (WIOA) Program

Customer Group: None Selected

Partner Program Status: Active Inactive All

Partner Program: None Selected

Location

Region/LWIA: Workforce Investment Board, Ventura County Human S
Verdugo Workforce Investment Board, Community Deve
County of Yolo Department of Employment and Social
WIOA Statewide Grant Contractor

Office Status: Active Inactive All

Office Location: None Selected
(Training) Generic Statewide Contractor Office
ABLE-DISABLED ADVOCACY, INC.
ABLE-DISABLED ADVOCACY, INC.

Date

Date Filter: Participation Date

Date Range: Last 7 Days

From: 02/23/2017 (mm/dd/yyyy)

To: 03/01/2017 (mm/dd/yyyy)

WIA-Specific

Grant Status: Active Inactive All

Grant Type: None Selected

Available Grants: 372 - 2030 WAF 4.0 Youth Participant
369 - 1082 - WAF 4.0 VETS Accelerator
371 - 1084 - WAF 4.0 Technical Assistance
358 - 1081 - WAF 4.0 New Accelerator

Run Report

1. In the **Program** area, select “Title I- Workforce Development” in the **Program** field. Leave the other fields as none selected.

2. In the **Location** area, go to the **Region/LWIA** and **Office Location** fields and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.

3. Next in the **WIA-Specific** area, select your grant in the **Available Grants** field.

4. Finally in the **Date** area, select “Participation Date” in the **Date Filter** field. Then, select your appropriate dates in the **Date Range** field.

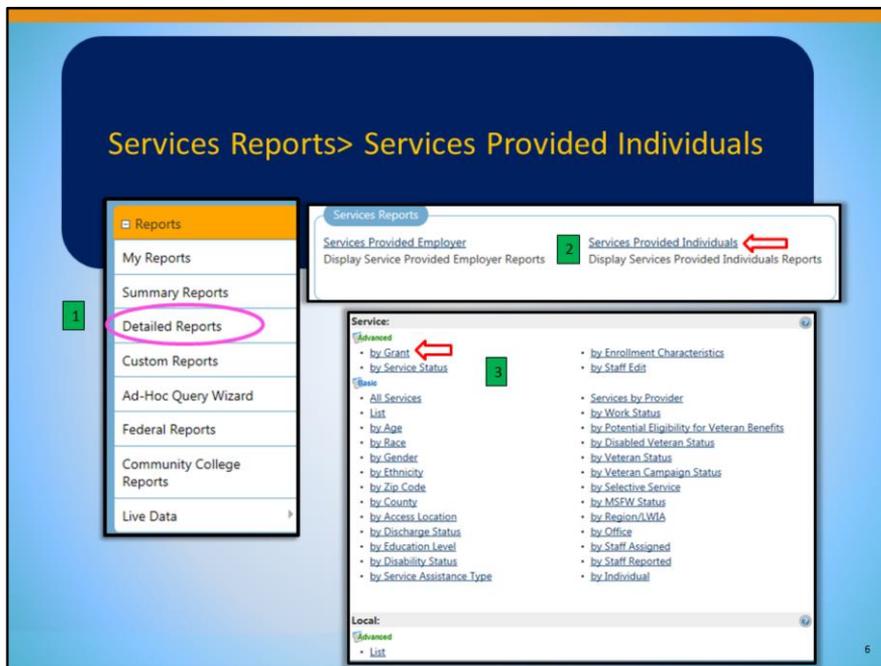
Enrolled Individuals- Results

Enrolled Individuals - By Region		
Participation Date: 02/14/2017 to 03/15/2017		
Report Type: Workforce Innovation and Opportunity Act (WIOA) Program		
Region/LWIA Name: WIOA Statewide Grant Contractor		
One Stop Location: L & R Career Center		
Statewide Grant Desc: 369 - 1082 - WAF 4.0 VETS Accelerator		
Region	Total	% Total
WIOA Statewide Grant Contractor	2	100.00 %
Region	Total	% Total
Total Rows: 1		

Enrolled Individuals - List													
Participation Date: 02/14/2017 to 03/15/2017													
Report Type: Workforce Innovation and Opportunity Act (WIOA) Program													
Region/LWIA Name: WIOA Statewide Grant Contractor													
One Stop Location: L & R Career Center													
Statewide Grant Desc: 369 - 1082 - WAF 4.0 VETS Accelerator													
User Name	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Assigned Case Mgr	Participation Date	Prior Participation	Map	
32664	2238545	Ruby	Rose	20	Redding	CA	US	L & R Career Center	Judysey Helmsing	12/27/2016	No	Map	
32666	2238699	Sonny	Gray	32	Sacramento	CA	US	L & R Career Center	No Case Assignmt	02/21/2017	No	Map	
User Name	App ID	First Name	Last Name	Age at Participation	City	State	Country	Office Location	Assigned Case Mgr	Participation Date	Prior Participation	Map	
Total Enrolled Individuals: 2													

Here is your list of individuals enrolled in your program.

Note: If you do not see as many participants as you may have thought were enrolled, there is a good chance that some of your individuals are NOT enrolled, meaning Participation might not have been created.



Next we will review the **Services Provided Individuals Report** which shows information about specific services provided to individuals by the staff members. You will want to run this report “by Grant”.

Of course this report can be used to see what services are being provided, but this report can also be ran using different filters to show the demographics of those you serve.

Report Filters

1 Program: Workforce Innovation and Opportunity Act (WIOA) Program
 Customer Group: None Selected
 Attending Any School: (Excluding Adult Education) None Selected

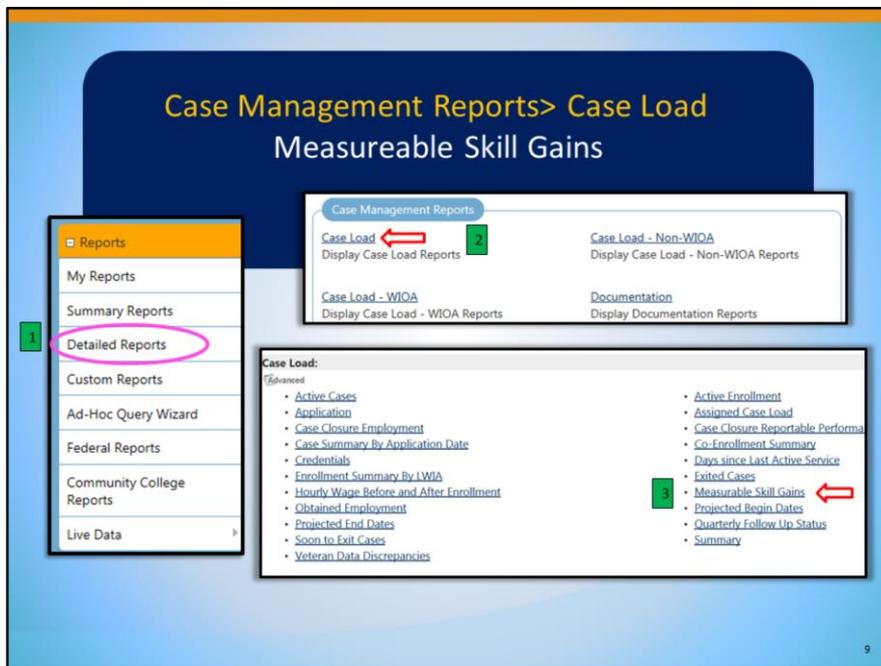
2 Location
 Region/LWIA Status: Active Inactive All
 Region/LWIA: Verduge Workforce Investment Board, Community Deve
 County of Yolo Department of Employment and Social
 WIOA Statewide Grant Contractor
 Workforce Alliance of North Bay
 Office Status: Active Inactive All
 Office Location: None Selected
 Triunton's Generic Statewide Contractor Office
 ABLE-DISABLED ADVOCACY, INC.
 ABLE-DISABLED ADVOCACY, INC.

3 WIA-Specific
 Grant Status: Active Inactive All
 Grant Type: None Selected
 Available Grants:
 372 - 2030 WAF 4.0 Youth Participant
 369 - 1082 - WAF 4.0 VETS Accelerator
 371 - 1084 - WAF 4.0 Technical Assistance
 370 - 1013 WAF 4.0 New Accelerator

4 Date
 Date Filter: Create Date
 Date Range: Custom Date
 From: 02/23/2017 (mm/dd/yyyy)
 To: 03/01/2017 (mm/dd/yyyy)

Run Report

1. In the **Program** area, select “Title I- Workforce Development” in the **Program** field. Leave the other fields as none selected.
2. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
3. Next in the **WIA-Specific** area, select your grant in the **Available Grants** field.
4. Finally in the **Date** area, select “Create Date” in the **Date Filter** field. Then, select your appropriate dates in the **Date Range** field.



Next we will review the **Measureable Skill Gains** report which provides a list of program participants that have received measurable skill gains.

This report shows each measurable skill gain entered for a participant, however, only one gain per PY is counted in the measure.

The screenshot displays the 'Report Filters' interface with three main sections:

- Program:**
 - Program: Title I - Workforce Development
 - Customer Group: None Selected
 - Partner Program Status: Active (selected), Inactive, All
 - Partner Program: None Selected
- Location:**
 - State Region: None Selected
 - Region/LWIA Status: Active (selected), Inactive, All
 - Region/LWIA: County of Mendocino, Merced County Department of Workforce Investment, Monterey County Workforce Investment Board, NoRTEC Governing Board (selected)
 - Office Status: Active (selected), Inactive, All
 - Office Location: None Selected
- Date:**
 - Program Year: 2017

A 'Run Report' button is located at the bottom left of the interface.

1. In the **Program** area, select “Title I- Workforce Development” in the **Program** field. Leave the other fields as none selected.
2. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
3. Finally in the **Date** area, select the appropriate year in the **Program Year** field.

Measurable Skill Gains- Results

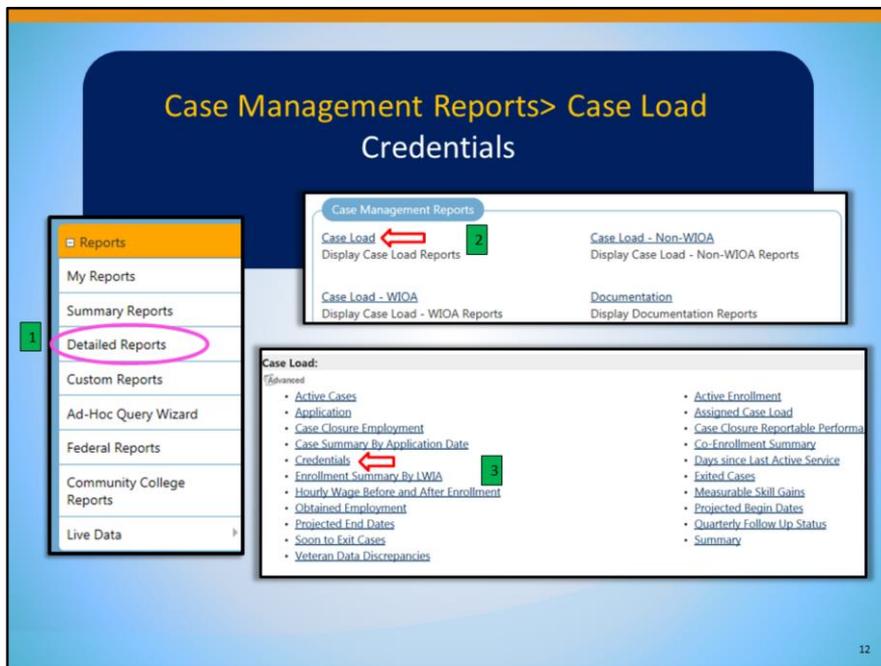
Measurable Skill Gains
 - Program: Title I - Workforce Development
 - Region: LWIA
 - Program Year: 07/01/2017 - 06/30/2018

Skill Type	Total Participants	% of Participants	Total Skill Gains	% of Skill Gains
Attainment of a secondary school diploma or its equivalent	2	1.25%	2	0.96%
Educational Functioning Level	10	6.25%	13	6.25%
Post-Secondary Transcript/Report Card	34	21.25%	39	18.75%
Secondary Transcript/Report Card	1	0.63%	1	0.48%
Skills Progression	45	28.13%	47	22.60%
Training Milestone	68	42.50%	106	50.96%
All Skill Types	160	100.00%	208	100.00%

Measurable Skill Gains
 - Program: Title I - Workforce Development
 - Region: LWIA
 - Program Year: 07/01/2017 - 06/30/2018

Name	State ID	User ID	App ID	Participation Date	Skill Type	Type of Achievement	Skill Gain Date	Assigned Staff	Office
				01/16/2015	Training Milestone	Other training milestone	12/17/2017		
				04/07/2017	Training Milestone	Enrollment: 301 - On-the-Job Training	07/14/2017		
				04/07/2017	Training Milestone	Achieved satisfactory or better progress report towards an established OJT training milestone - not previously recorded	07/14/2017		

What results is a list of gains for participants that have been entered by staff.



Next, we will review the **Credentials** report which provides information on participants' credential attainment.

Report Filters

Program

Program:

Customer Group:

Partner Program Status: Active Inactive

Partner Program:

Location

State Region:

Region/LWIA Status: Active Inactive All

Region/LWIA:

Office Status: Active

Office Location:

Date

Filter By Date:

Date Range:

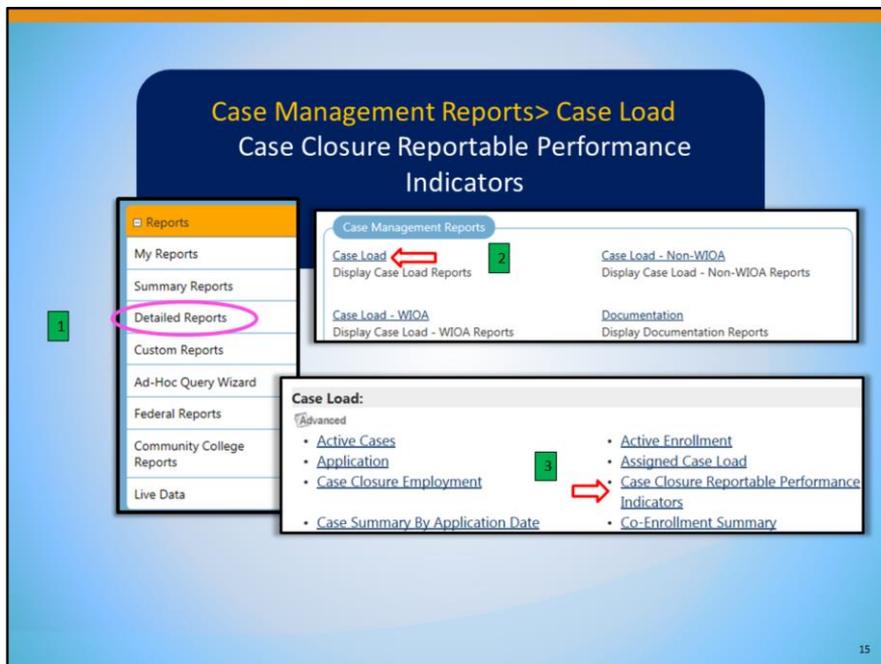
From: (mm/dd/yyyy)

To: (mm/dd/yyyy)

1. In the **Program** area, select “Title I- Workforce Development” in the **Program** field. Leave the other fields as none selected.
2. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
3. Finally in the **Date** area, select “Credential Date” in the **Filter By Date** field. Then, select your appropriate dates in the **Date Range** field.

Credentials- Results

User ID	State ID	App ID	Name	Office	Participation Date	Closure Date	Exit Date	Assigned Staff	Credential Type	Credential Date	Provider	Page Reported	
					09/26/2016	09/12/2017			Occupational Skills License	09/20/2017	Butte College		
					05/16/2017				Occupational Certification	09/13/2017	AFWD		
					05/15/2017				Occupational Certification	09/25/2017	AFWD		
					05/15/2017				Occupational Certification	09/12/2017	AFWD		
					05/25/2017	09/29/2017			Occupational Skills Certificate or Credential	09/14/2017	SUTTER COUNTY SUPERINTENDENT OF SCHOOLS		
					Total Individuals: 5								
									Total Credentials: 5				



Case Closure Reportable Performance Indicators - This report lists individuals in a federal program by reportable performance indicators. The report outcome shows performance indicators for credential attainment, school status and diploma, and employment placement information. Much of this data is derived from the Case Closure form in an individual's program application.

1. In the **Report Type** area, select “Both- Displays all closure types” in the **Report Type** drop-down.
2. In the **Program** area, select “Title I- Workforce Development” in the **Program** drop down. Leave the rest of the filters as none selected.
3. In the **Location** area, go to **Region/LWIA** and **Office Location** and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
4. Finally in the **Date** area, select “Actual Closure Date” in the **Filter by Date** field. Then, select your appropriate dates in the **Date Range** field.

Case Closure Reportable Performance Indicators-Results

Case Management Reports
Case Closure Reportable Performance Indicators - Detail Report
 Report Type: Both - Displays all closure types
 Program: Workforce Innovation and Opportunity Act (WIOA) Program
 LWIA/Region: WIOA Statewide Grant Contractor
 OIG: L & P Career Center
 Grant: 369 - 1002 - WIAF 4 0 VETS Accelerator
 Filter By Date: Actual Case Closure
 Date Range: 02/14/2017 - 03/15/2017

* Indicates that column may be used for federal reporting when all countable criteria is met, please refer to your program guidance on when data is countable for performance.

App #:	State ID:	Name:	Office:	Case Manager:	Credential:	Credential Other:	Credential Date:	School Status:	Attained Diploma:	Diploma Date:	Entered Employment:
2238019	31806	John Teal	L & P Career Center					Not attending school, H.S. Graduate			3/5/2017
2238091	31803	John Teal	L & P Career Center					Not attending school, H.S. Graduate			3/13/2017

Here is your list of Case Closures Reportable Performance Indicators to those enrolled in your program. In this screenshot, the **School Status** and **Entered Employment** columns contain data.

Case Management Reports > Documentation Individual Case Notes

The screenshot displays a web application interface with the following components:

- Left Navigation Menu:** A sidebar menu with the following items: Reports, My Reports, Summary Reports, Detailed Reports (circled in pink), Custom Reports, Ad-Hoc Query Wizard, Federal Reports, Community College Reports, and Live Data. A green box with the number '1' is positioned to the left of the 'Detailed Reports' item.
- Case Management Reports Section:** A panel containing four report options:
 - Case Load:** Display Case Load Reports
 - Case Load - Non-WIOA:** Display Case Load - Non-WIOA Reports
 - Case Load - WIOA:** Display Case Load - WIOA Reports
 - Documentation:** Display Documentation Reports (highlighted with a red arrow and a green box with the number '2')
- Case Notes Section:** A panel with the following sections:
 - Case Notes:** Includes an 'Advanced' search icon and a list of filters: Employer, Provider, and Individual (highlighted with a red arrow and a green box with the number '3').
 - Document Management:** Includes an 'Advanced' search icon and a filter: Enrollment.
 - Last Case Note:** Includes an 'Advanced' search icon and a filter: Last Case Note for Participant.

This Case Notes report will retrieve case notes created for individuals. Staff can search for specific case notes in a variety of ways, including a popular keyword search that locates case notes based on a word or phrase in the subject field or the narrative field.

The screenshot shows the 'Report Filters' interface with the following sections and callouts:

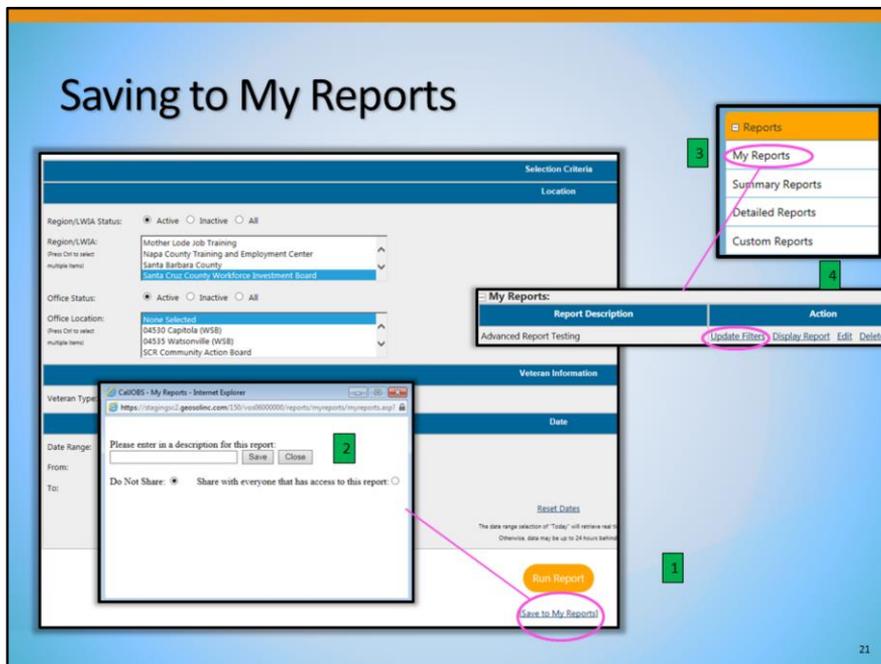
- 1. Report Type:** A drop-down menu with 'Exact Match' and 'Includes' options.
- 2. Case Notes:** A 'Case Note Subject' text field containing '328' and radio buttons for 'Exclude System Case Notes' (selected) and 'Include System Case Notes'.
- 3. Program:** Radio buttons for 'Active' (selected), 'Inactive', and 'All', and a 'Program' dropdown menu showing 'Workforce Innovation and Opportunity Act (WIOA) Program'.
- 4. Location:** Radio buttons for 'Region/LWIA Status' (Active, Inactive, All), a 'Region/LWIA' dropdown menu with 'WIOA Statewide Grant Contractor' selected, radio buttons for 'Office Status' (Active, Inactive, All), and an 'Office Location' dropdown menu with 'JEWISH VOCATIONAL SERVICE SF' selected.
- 5. Date:** A 'Date Range' dropdown menu with 'Last 30 Days' selected, and 'From' and 'To' date pickers showing '02/05/2017' and '03/06/2017' respectively.

A 'Run Report' button is located at the bottom center of the interface.

1. In the **Report Type** area, select “Includes” from the **Report Type** drop-down.
2. In the **Case Notes** area, type in what word or number you want find that is included in the subject name of the case notes in the **Case Note Subject** field.
3. In the **Program** area, select “Title I- Workforce Development” .
4. In the **Location** area, go to **Region/LWIA** and **Office Location**, and make appropriate selections. Your location will most likely auto populate. If not, be sure to choose the correct Region and Office Location. If you are a Non-Local Area, be sure your Region/LWIA is WIOA Statewide Grant Contractor.
5. Finally in the **Date** area, select the appropriate date range in the **Date Range** field.

Individual Case Notes- Results

Case Management Report - Case Notes - Individual Case Notes Report									
Program: Workforce Innovation and Opportunity Act (WIOA) Program LWIARegion: WIOA Statewide Grant Contractor Office: L.S. # Career center Include System Case Notes: No Date Range: 02/14/2017 - 03/15/2017									
Userid	Individual	Created By	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
32810	Test, John	Rose, Rianna	3/7/2017	3/7/2017	Rose, Rianna	3/7/2017	31966	328 Case Note Test	Case Note Test
32814	Tester, John	Rose, Rianna	3/13/2017	3/13/2017	Rose, Rianna	3/13/2017	31969	328 Training Activity	Training Activity
Userid	Individual	Created by	Create Date	Contact Date	Last Edited By	Last Edit Date	State ID	Case Subject	Case Notes
Total Rows: 2									



If you would like to save a report and its filters to **My Reports**:

1. Choose the “Save to My Reports” link at the bottom of each report *before* you select the “Run Report” button.
2. You may receive a pop-up blocker message. Allow the pop-up, and name your report in the description area; choose “Save”.
3. Your report with the same filters will appear in **My Reports**.
4. You can easily run the report by selecting “Update Filters” in the Action column when you are in your **My Reports**.

Note on Predictive Reports

CalJOBS™ Predictive Reports

Provider:
Advanced
• [Training Provider Evaluation](#)

WIA:
Advanced
• [Credential Attainment Indicators](#)
• [Employment and Credential Indicators](#)
• [Entered Employment Indicators](#)
• [Total Exits Indicators](#)
• [Youth Attainment of Degree or Certificate](#)
• [Youth Placement in Employment or Education](#)
• [Earnings Indicators](#)
• [Employment Retention Indicators](#)
• [Literacy and Numeracy Indicators](#)
• [Total Participants Indicators](#)
• [Youth Diploma or Equivalent Indicators](#)
• [Youth Skill Attainment Indicators](#)

WIOA:
Advanced
• [Effectiveness in Serving Employers](#)

- Predictive Reports show numerators and denominators
- All Reports created using Predictive Reports are inaccurate

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CalJOBS houses predictive reports which help local staff predict the reporting results and outcomes of data in a manner that parallels WIOA quarterly and annual reports. These reports show the numerators and denominators, however, they are inaccurate until further notice.

Use the question mark icon for more information on each report.