CalJOBS℠ 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.

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

Individual Reports | Enrolled Individual Reports - These reports combine information from an individual's registration form with basic case management fields. It is one of the primary reports that staff members can initially run when documenting case management program information on a group of individuals.

You can run the report by Region/LWIA and will be able to choose "Grant" as a filter. Your participants must be enrolled to show in this report. If they are not showing in this report, participation was not created to enroll.

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.

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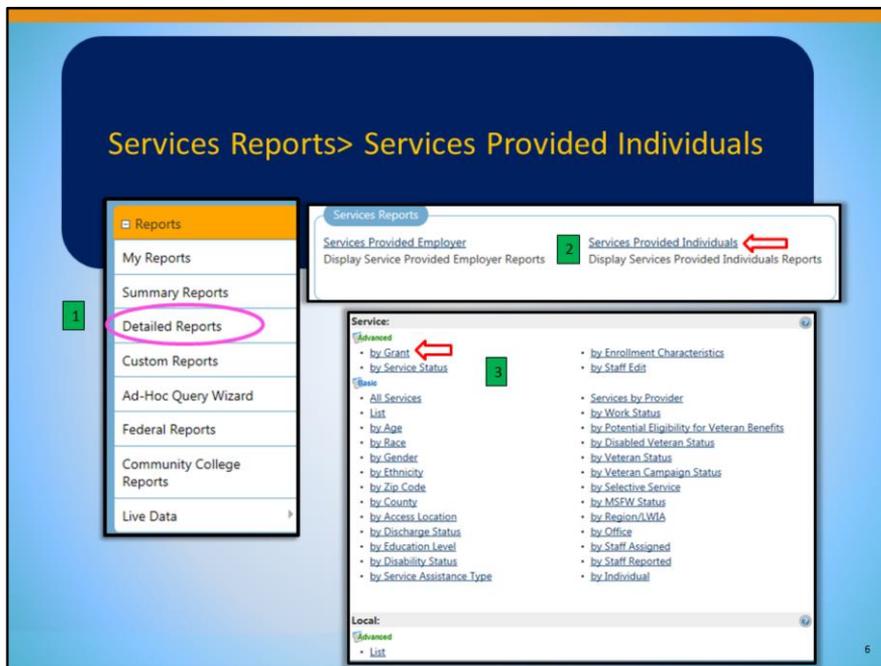
Next we will review the **Services Provided Individuals Report** which shows information about specific services provided to individuals by the staff members. You will want to run this report "by Grant".

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.

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.

Here is your list of services provided to those enrolled in your program.
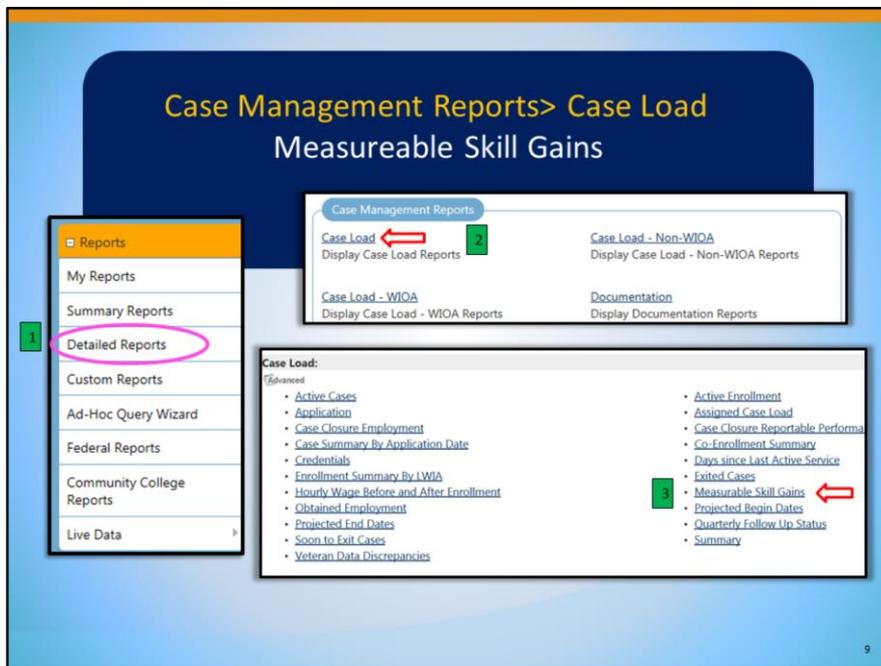
Next we will review the **Measureable Skill Gains** report which provides a list of program participants that have received measurable skill gains.

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

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.

What results is a list of gains for participants that have been entered by staff.
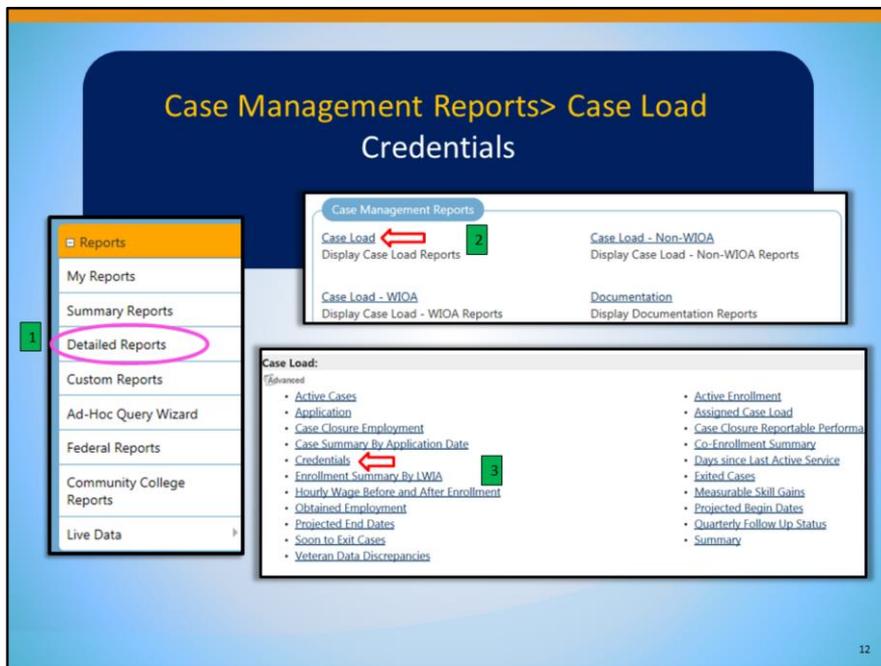
Next, we will review the **Credentials** report which provides information on participants' credential attainment.

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	
User ID	Statte ID	App ID	Name	Office	Participation Date	Closure Date	Exit Date	Assigned Staff	Credential Type	Credential Date	Provider	Page Reported
									Total Individuals: 5			Total Credentials: 5

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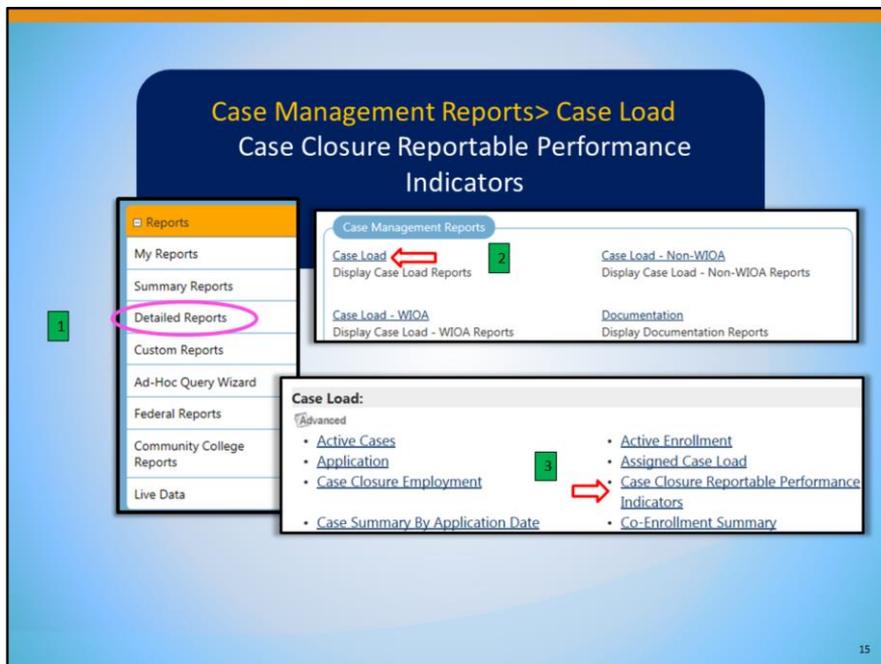
Case Closure Reportable Performance Indicators - This report lists individuals in a federal program by reportable performance indicators. The report outcome shows performance indicators for credential attainment, school status and diploma, and employment placement information. Much of this data is derived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

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.

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.

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
LWIA/Region: WIOA Statewide Grant Contractor
Office: L & R 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
32910	Test, John	Rose, Rianna	3/7/2017	3/7/2017	Rose, Rianna	3/7/2017	31866	328 Case Note Test	Case Note Test.
32914	Tester, John	Rose, Rianna	3/13/2017	3/13/2017	Rose, Rianna	3/13/2017	31869	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
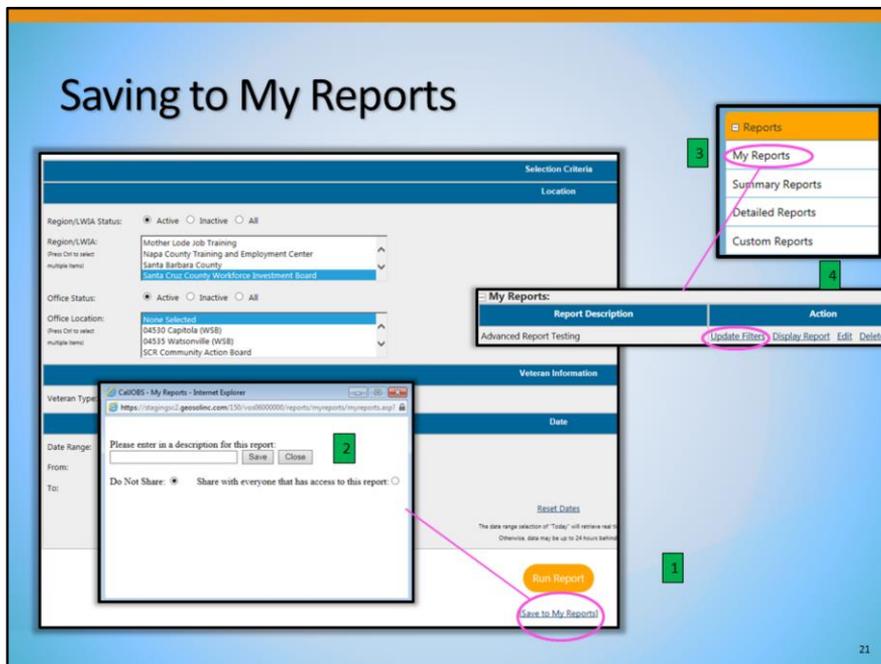
If you would like to save a report and its filters to **My Reports**:

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 Exiters 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

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.