SkillUP Report User Guide

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Services Provided Individual Report – by Provider

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

> Reports

- My Reports
- Summary Reports
- Detailed Reports
- Custom Reports
- Ad-Hoc Query Wizard
- Federal Reports
- Live Data

Then click on Detailed Reports

> Quick Search

Enter Search...

> My Staff Workspace

- My Staff Dashboard
- My Staff Resources
- My Staff Account
- Directory of Services

> Services for Workforce Staff

- Manage Individuals
- Manage Employers
- Manage Resumes
- Manage Job Orders
- Manage Labor Exchange
- Manage Activities
- Manage Providers

Please select from the Reports options listed below.

- My Reports
  Select this option to display specific reports that you have previously saved.

- Summary Reports
  Select this option to view executive summary reports and dashboards summarizing key information.

- Detailed Reports
  Select this option to view reports outlining specific information in the system by a variety of parameters and filters.

- Custom Reports
  Select this option to view reports developed for specific states.

- Ad-Hoc Query Wizard
  Select this option to create your own queries and output from the database.

- Federal Reports
  Select this option to run specific federal reports.

- Live Data
  Select this option to view live data.

Scroll down the Detailed Reports page until you see Services Reports and Click on Services Provided Individuals

> Services Reports

- Services Provided Employer
  Display Service Provided Employer Reports

- Services Provided Individuals
  Display Services Provided Individuals Reports
Click on by Provider under the Service section

**Local:**
- List
- Registered Users Past Due

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

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

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

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

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

<table>
<thead>
<tr>
<th>Provider</th>
<th>Distinct Users</th>
<th>Total Services</th>
<th>% of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>J. Large Academy Of Beauty Art. Llc</td>
<td>1</td>
<td>1</td>
<td>0.03 %</td>
</tr>
<tr>
<td>Taida: Lic Drive Truck Dynasty Driving Academy</td>
<td>7</td>
<td>7</td>
<td>0.21 %</td>
</tr>
<tr>
<td>CONVERSION LWA 01</td>
<td>5</td>
<td>20</td>
<td>0.60 %</td>
</tr>
<tr>
<td>CONVERSION LWA 02</td>
<td>17</td>
<td>64</td>
<td>2.54 %</td>
</tr>
<tr>
<td>CONVERSION LWA 04</td>
<td>17</td>
<td>30</td>
<td>0.91 %</td>
</tr>
<tr>
<td>CONVERSION LWA 06</td>
<td>9</td>
<td>15</td>
<td>0.45 %</td>
</tr>
<tr>
<td>CONVERSION LWA 07</td>
<td>7</td>
<td>40</td>
<td>1.21 %</td>
</tr>
<tr>
<td>CONVERSION LWA 09</td>
<td>42</td>
<td>170</td>
<td>5.14 %</td>
</tr>
<tr>
<td>CONVERSION LWA 10</td>
<td>14</td>
<td>50</td>
<td>1.78 %</td>
</tr>
<tr>
<td>CONVERSION LWA 11</td>
<td>8</td>
<td>29</td>
<td>0.83 %</td>
</tr>
<tr>
<td>CONVERSION LWA 13</td>
<td>10</td>
<td>74</td>
<td>2.24 %</td>
</tr>
<tr>
<td>CONVERSION LWA 14</td>
<td>5</td>
<td>18</td>
<td>0.54 %</td>
</tr>
<tr>
<td>CONVERSION LWA 15</td>
<td>2</td>
<td>7</td>
<td>0.21 %</td>
</tr>
<tr>
<td>Conversion Provider</td>
<td>95</td>
<td>322</td>
<td>9.73 %</td>
</tr>
<tr>
<td>Central Region Workforce Investment Board</td>
<td>4</td>
<td>6</td>
<td>0.18 %</td>
</tr>
<tr>
<td>MERS Goodwill Industries</td>
<td>221</td>
<td>550</td>
<td>16.62 %</td>
</tr>
<tr>
<td>City of Springfield</td>
<td>30</td>
<td>154</td>
<td>4.85 %</td>
</tr>
<tr>
<td>Community Action Partnership of St. Joseph</td>
<td>2</td>
<td>3</td>
<td>0.09 %</td>
</tr>
<tr>
<td>Northeast Community Action Corporation</td>
<td>2</td>
<td>14</td>
<td>0.42 %</td>
</tr>
<tr>
<td>RESCARE</td>
<td>1</td>
<td>1</td>
<td>0.03 %</td>
</tr>
<tr>
<td>Delta Area Economic Opportunity Corporation</td>
<td>10</td>
<td>50</td>
<td>1.51 %</td>
</tr>
<tr>
<td>South Central Missouri Community Action Agency</td>
<td>6</td>
<td>10</td>
<td>0.30 %</td>
</tr>
<tr>
<td>Economic Security Corporation of the Southwest Area</td>
<td>10</td>
<td>44</td>
<td>1.33 %</td>
</tr>
<tr>
<td>West Central Missouri Community Action Agency</td>
<td>5</td>
<td>12</td>
<td>0.36 %</td>
</tr>
</tbody>
</table>
The report for your agency will appear.

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

Click on Excel

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

Click on Manage Case Assignment in the left navigation bar

Then Click on Individual Case Assignment

Please select from the Manage Case Assignment options listed below.

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

Then Click on View Case Load

Please select from the Individual Case Assignment options listed below.

- **Manage Groups**: Select this option to create, edit, or delete groups.
- **Staff Group Assignment**: Select this option to assign staff members to case management groups.
- **Individual Assignment**: Select this option to assign individually to a primary case manager or to a case management group.
- **Temporary Assignment**: Select this option to temporarily assign one staff member's cases to another staff member.
- **Group Re-assignment**: Select this option to move cases from one group to another.
- **View Case Load**: Select this option to view the case load for a staff member or group.
Select your agency from the Group Name list and select the appropriate region from the list, then click Filter. Note: if your agency works in multiple regions, you will need to run the report for each region.

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

<table>
<thead>
<tr>
<th>Staff</th>
<th>Active Cases</th>
<th>Closed Cases</th>
<th>Follow-up Cases</th>
<th>Total Current Cases</th>
<th>Completed Follow-up Cases</th>
<th>Temporary Assignments</th>
<th>Apps Closed Never Enrolled</th>
<th>Active Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Test2</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Test3</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>Yes</td>
<td></td>
</tr>
</tbody>
</table>

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

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

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

Click on Detailed Reports.

Case Management Reports

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

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

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

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

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

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

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

**Case Load:**

- Active Cases
- Application
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Summary
- Days since Last Active Service
- Enrollment Summary By LWIA
- Exit Cases
- Hourly Wage Before and After Enrollment
- Obtained Employment
- Projected Begin Dates
- Quarterly Follow-Up Status
- Summary
- Veteran Data Discrepancies
- Active Enrollment
- Assigned Case Load
- Case Closure Information
- Case Summary By Application Date
- Credentials
- Eligibility Enrollments
- Exit Reason Summary
- Expiring Work Authorization
- Measurable Skill Gains
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Targeted Measurable Skill Gain

Choose the appropriate parameters:

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

<table>
<thead>
<tr>
<th>Report Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>LWIA/Office Location</td>
</tr>
<tr>
<td>LWIA/Office Location/Assigned Case Manager</td>
</tr>
</tbody>
</table>

**Program:** SNAP Employment and Training

**Customer Group:** SNAP E and T

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

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

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

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

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

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

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

**Case Management Reports**

- **Case Load**
  - Display Case Load Reports
- **Case Load - WIOA**
  - Display Case Load - WIOA Reports
- **Payment**
  - Display Payment Reports
- **Staff Referrals**
  - Display Staff Referrals Reports
- **Case Load - Non-WIOA**
  - Display Case Load - Non-WIOA Reports
- **Documentation**
  - Display Documentation Reports
- **Predictive**
  - Display Predictive Reports
- **WTP**
  - Display WTP Reports
Click on Days since Last Active Service

Select the appropriate parameters for the report:

Program is SNAP Employment and Training

Program:

- SNAP Employment and Training

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

State Region: State Region 1

Region/LWDB Status:
- Active
- Inactive
- All

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

Office Status:
- Active
- Inactive
- All

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

<table>
<thead>
<tr>
<th>Case Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group Status:</strong></td>
</tr>
<tr>
<td><strong>Case Manager Group:</strong></td>
</tr>
<tr>
<td><strong>Case Manager Status:</strong></td>
</tr>
<tr>
<td><strong>Assigned Case Manager:</strong></td>
</tr>
</tbody>
</table>

Select the date range

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

Click Run Report

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

Click on Excel

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

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

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

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

Click on Obtained Employment
Select the parameters for the report:

Program is SNAP Employment and Training

<table>
<thead>
<tr>
<th>Program: SNAP Employment and Training</th>
</tr>
</thead>
</table>

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

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

Office Status: Active Inactive All

Office Location: None Selected

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

Select the date parameters

**Date Range:** Last 90 Days

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

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

Click Run Report

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

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

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

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

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

**Case Management Reports**

- **Case Load**
  - Display Case Load Reports
- **Case Load - WIOA**
  - Display Case Load - WIOA Reports
- **Payment**
  - Display Payment Reports
- **Staff Referrals**
  - Display Staff Referrals Reports
- **Case Load - Non-WIOA**
  - Display Case Load - Non-WIOA Reports
- **Documentation**
  - Display Documentation Reports
- **Predictive**
  - Display Predictive Reports
- **WTP**
  - Display WTP Reports
Click on Exit Cases

Select the appropriate parameters for the report:

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

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

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
You may also select the county, city and zip code if desired.

Outside the US:  
- No  
- Yes

State:  
Missouri

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

City:

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

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

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

Then enter the Date parameters:

Filter By Date:  
- Exit Date

Date Range:  
- Last 90 Days

From:  
03/20/2019

To:  
06/17/2019

Click Run Report

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

Click on Excel

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

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

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

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

Case Management Reports

Case Load
Display Case Load Reports

Case Load - WIOA
Display Case Load - WIOA Reports

Payment
Display Payment Reports

Staff Referrals
Display Staff Referrals Reports

Click on Projected Begin Dates
Case Load:

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

Select the appropriate parameters:

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

Program:

Customer Group:

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

Region/LWDB Status:

Office Status:

Office Location:

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

<table>
<thead>
<tr>
<th>Provider</th>
<th>2468 - William Jewell College</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>3252 - William Woods University</td>
</tr>
<tr>
<td></td>
<td>2802 - Wireco World Group</td>
</tr>
<tr>
<td></td>
<td>3265 - Wireless Infrastructure Association/irap</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Case Assignment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Status:</td>
</tr>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Case Manager Group:</td>
</tr>
<tr>
<td>None Selected</td>
</tr>
<tr>
<td>Case Manager Status:</td>
</tr>
<tr>
<td>Active</td>
</tr>
<tr>
<td>Assigned Case Manager:</td>
</tr>
<tr>
<td>None Selected</td>
</tr>
</tbody>
</table>

Select the Date parameter

| Date |
| Days BeforeProjected Start: |
| 30 Days from Start |
Click Run Report

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

Click on Excel

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

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

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

<table>
<thead>
<tr>
<th>Name</th>
<th>Cust Group</th>
<th>Office</th>
<th>State ID</th>
<th>App ID</th>
<th>Projected Begin</th>
<th>Actual Begin</th>
<th>Last Edit</th>
<th>Assigned Case Manager</th>
<th>Status</th>
</tr>
</thead>
</table>
Projected End Dates

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

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

Click on Detailed Reports

Click on Case Load Reports under the Case Management Reports heading

Case Management Reports

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Load</td>
<td>Display Case Load Reports</td>
</tr>
<tr>
<td>Case Load - WIOA</td>
<td>Display Case Load - WIOA Reports</td>
</tr>
<tr>
<td>Payment</td>
<td>Display Payment Reports</td>
</tr>
<tr>
<td>Staff Referrals</td>
<td>Display Staff Referrals Reports</td>
</tr>
<tr>
<td>Case Load - Non WIOA</td>
<td>Display Case Load - Non-WIOA Reports</td>
</tr>
<tr>
<td>Documentation</td>
<td>Display Documentation Reports</td>
</tr>
<tr>
<td>Predictive</td>
<td>Display Predictive Reports</td>
</tr>
<tr>
<td>WTP</td>
<td>Display WTP Reports</td>
</tr>
</tbody>
</table>
Click on Projected End Dates

Select the appropriate parameters:

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

<table>
<thead>
<tr>
<th>Program:</th>
<th>SNAP Employment and Training</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Group:</td>
<td>None Selected</td>
</tr>
<tr>
<td></td>
<td>SNAP E and T</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Region/LWDB Status:</th>
<th>Active</th>
<th>Inactive</th>
<th>All</th>
</tr>
</thead>
<tbody>
<tr>
<td>Region/LWDB:</td>
<td>None Selected</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Office Status:</td>
<td>Active</td>
<td>Inactive</td>
<td>All</td>
</tr>
<tr>
<td>Office Location:</td>
<td>None Selected</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Staff may select County, City or Zip Code if desired

Outside the US:  
- No  
- Yes

State:  
- Missouri

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

City:

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

Staff may select the Provider for the upcoming training if desired

Provider Status:  
- Active  
- Inactive  
- All

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

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

Group Status:  
- Active  
- Inactive  
- All

Case Manager Group:  
- None Selected

Case Manager Status:  
- Active  
- Inactive  
- All

Assigned Case Manager:  
- None Selected  
- Select Me

Select the Date parameter

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

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

Click on Excel

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