WorkinTexas.com Reports Management Training

Instructor Notes

Approved by the

Texas Workforce Commission

Training and Development Department

Training and Development Mission

We are here to help TWC and our partners enhance employee workplace skills and productivity through the development, coordination, and delivery of quality learning opportunities.

Texas Workforce Commission

Training and Development Department

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Equal Opportunity Employer/Program

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WorkinTexas.com Reports Management

Pre-requisites:

View the TX WIT System Overview Training Video (recommended):

System Overview Video (Opens in a new window)

Training Materials:

- Reports Case Management Training Guide
- Reports Exercise Workbook
- Reports Management Training Agenda
- Reports Training Syllabus
- Reports Training Instructor Notes (this document)

Equipment Requirements:

One computer per student.

Computer Requirements:

Computers with high-speed Internet access.

Software Requirements:

- URL Link to WIT Training Site - Training Website (opens in a new window)
- Browser – Users may choose from the following browser options:

  - Microsoft Edge
  - Mozilla Firefox 30 or higher
  - Apple Safari 5 or higher
  - Google Chrome 36 or higher
  - Opera 22 or higher

- Internet Access – Users should connect to this system using a dedicated broadband or high-speed access, 380k or higher. Users accessing the Internet through a cable modem or DSL meet this requirement.
- Cookies – Users will need to enable the acceptance of cookies in their browser preferences. If they are unsure what cookies are or what they can do to enhance their browsing experience, click here to learn about cookies from Microsoft.
- JavaScript – The selected browser must support JavaScript.
- Pop-up Blockers – If users employ a Pop-Up Blocker, they will need to disable it in order to access certain features of the WIT Replacement Project system. Most Pop-Up Blockers can be disabled temporarily by holding down the CTRL key.

About the CMS Training Content

The Work in Texas system provides a robust list of reports and report categories to assist with all types of system reports. Report categories are organized in a logical manner so that users can locate pertinent reports with relative ease. Report outcomes are organized to provide an extensive amount of information based on data input.

To learn more about the report categories and the report titles available, refer to the Reports Training Guide.

Note: Reports will only generate data if specific program processes and functionality have occurred. For example, staff must have entered data throughout the program case management process that corresponds to the specific report parameters. As the Training environment is generally lighter on data compared to the Live site environment, you will want to either create data corresponding to the reports you want to show or validate prior to training that your search parameters will show meaningful results.

Getting Started: Staff Login

To manage report generation in the WIT system Training environment, staff must first log in to the training system, just as they would to manage service delivery for individuals in any of the programs that WIT includes.

Training participants will be using training accounts set up for Go Live training. Their initial login to the system may be problematic,

so allow for extra time to make sure everyone has logged in successfully. It is better to validate this early than to wait.

What you should know:

- Usernames are not case sensitive
- Passwords are case sensitive
- Multiple unsuccessful attempts can lock the user out of the system, based on security settings that might be in place. If this happens, authorized staff should be available to access the WIT Admin system to unlock staff training participants.

Reports Overview

The Virtual OneStop system includes a robust reporting module that lets users generate a wide variety of reports (as allowed by their assigned user privileges). Users can create reports that display:

- Information about the individuals and employers using the system and the methods they use to access information in the system.
- Information on services that are provided to these users.
- Statistical information on case management programs, job orders, job applicants, and résumé.
- Case management data related to goals, program applications, enrollments, skill attainment rates, program exits, and other information that reflects details of program workflows managed by staff/case managers.

Case management reports are the biggest and most helpful reporting category. These reports help staff members manage and quantify their workload, identify cases that require follow-up activities, and estimate performance in local regions before generating similar information that is required by federal reports. Beyond the introductory training exercises to acquaint training participants with the Reports design scheme, most of your time spent generating sample reports will occur within the Case Management reports category.

Note: The Live Data reports category is not available in the Work in Texas (WIT) system. Additionally, the State of Texas will not rely on federal reports available in the system. Rather, the State will continue to use its Data Warehouse utility to meet federal reporting requirements.

Reports to Demonstrate (by Category and Title)

The following section identifies the reports generated by Geographic Solutions' trainers. You are welcome to use this same approach or develop additional reports of interest to share with your class.

Summary Reports

Master Summary

Detail Master Summary Report

- Region = Capital Area WF Board
- Date = This year to date

Detailed Reports

Case Management – Program Specific Reports (SNAP)

Note: Report titles displaying a gold star are newly created specifically for Texas.

SNAP Program-Specific Case Management Reports Menu

1. SNAP E&T Management Report (aka, TWIST #224)
   - Region = Capital Area WF Board
   - Date = Sept 2023
2. SNAP Outreach Report (aka, TWIST #109)
   - Region = Capital Area WF Board
   - Date = This year to date

Note: This report might not display data, only the report format.

3. (SNAP) Component Enrollment Report
   - Region = Capital Area WF Board
   - Date = This year to date

Detailed Reports

Case Management – Program Specific Reports (TAA)

Note: Report titles displaying a gold star are newly created specifically for Texas.

TAA Program-Specific Case Management Reports Menu

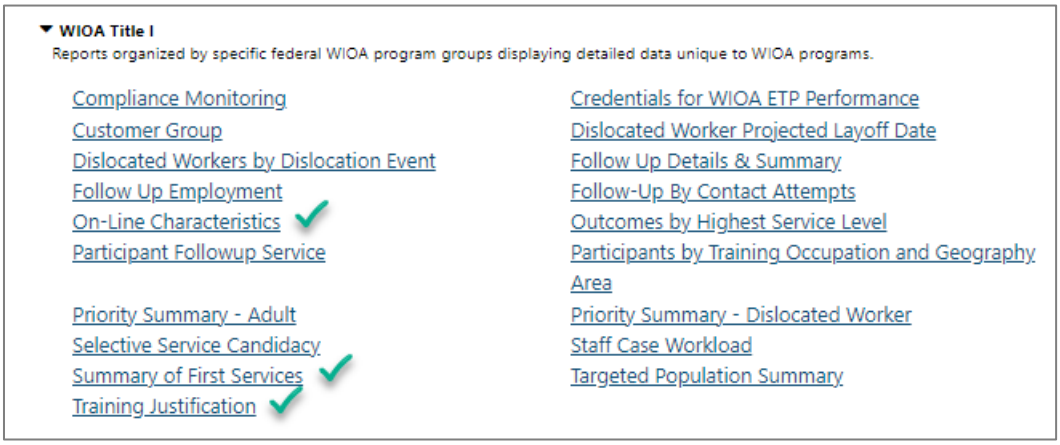
1. TAA Eligible Customers Outreach Report – This report is outreach to future TAA eligible participants who are approaching their waiver/in training deadline date but, they lack a TAA application in VOS.
   - Region = Capital Area WF Board
   - Date = This year to date
2. TAA Beyond 30 Day Enrollment Period List Report (aka, TWIST #129) – This report is used to determine if the Trade participant enrolls in training within 30 calendar days of their TRA enrollment start date. Once a participant is enrolled TRA may waive the job search requirement. If the participant is receiving basic TRA and fails to start within 30 days, TRA must deny future benefits.

- Region = Capital Area WF Board
- Date = As of Today (Default)

3. TAA Waiver Report
   - Region = Capital Area WF Board
   - Date = This year to date

Detailed Reports

Case Management – Program Specific Reports (WIOA)



WIO Program-Specific Case Management Reports Menu

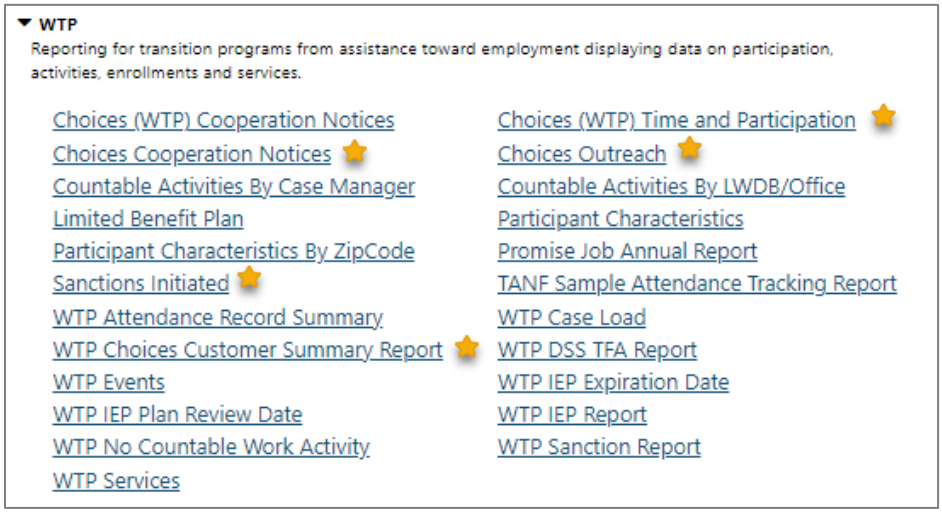
1. On-line Characteristics Report
   - Region = Capital Area WF Board
2. Training Justification Report
   - Region = Capital Area WF Board
   - Date = Last 90 Days
3. Summary of First Services Report
   - Region = Capital Area WF Board

- Date = Last 90 Days

Detailed Reports

Case Management – Program Specific Reports (Choices)

Note: Report titles displaying a gold star are newly created specifically for Texas. The Welfare to Work (WTP) program is synonymous with the Choices program here in the WIT system.



Choices Program-Specific Case Management Reports Menu

1. Choices Outreach Report (aka, TWIST #97)
   - Region = Capital Area WF Board
   - Date = This year to date

Note: This report might not display data, only the report format.

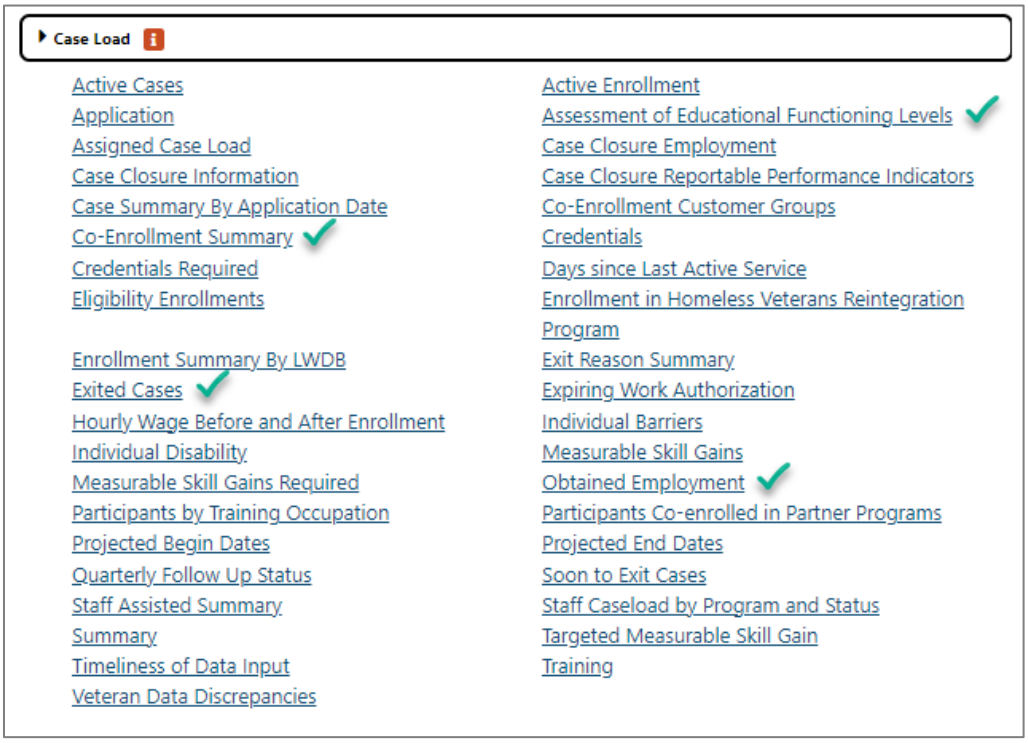
2. Sanctions Initiated Report
   - Region = Capital Area WF Board
   - Date = This year to date
3. Choices Customer Summary Report (aka, TWIST #34)

- Region = Capital Area WF Board
- Date = Sept 2023

4. Choices Time and Participation Report (aka, TWIST #177)
   - Region = Capital Area WF Board
   - Date = This year to date

Detailed Reports

Case Management – Case Status – Case Load



Case Load Reports Menu

1. Assessment of Educational Functional Levels Report
   - Program = WIOA
   - Region = Capital Area WF Board

- Date = This year to date

2. Exited Cases Report
   - Program = WIOA
   - Region = Capital Area WF Board
   - Date = Last 12 months (Default)
3. Co-enrollment Summary Report (TAA, WP, WIOA only)
   - Region = Capital Area WF Board
   - Date = This year to date
4. Obtained Employment Report
   - Program = SNAP E&T
   - Region = Capital Area WF Board
   - Date = This Year to Date

Detailed Reports

Case Management – Predictive

Predictive Reports Menu

1. Measurable Skills Gain Indicators Report
    - Program = WIOA and TAA
    - Region = Capital Area WF Board
    - Date = Manual (This Year to Date)
2. TAA Payments Report
    - Region = Capital Area WF Board
    - Date = Quarter 1 (Default)

Detailed Reports

Case Management – Training

Training Reports Menu

1. List Report
    - Program = WIOA
    - Region = Capital Area WF Board
    - Date = This Year to Date)

Custom Reports

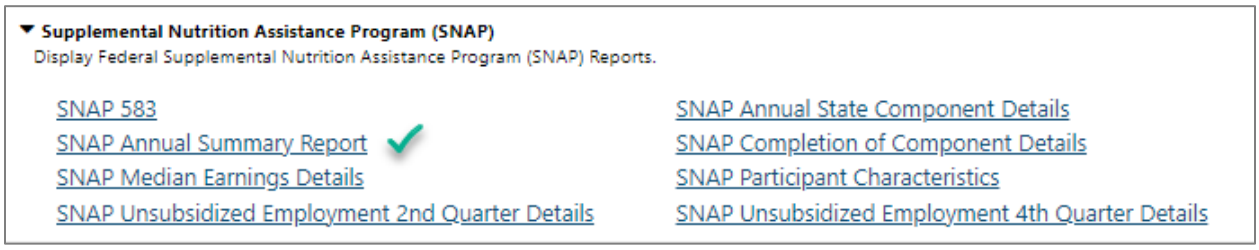
Locally Developed

Locally Developed Custom Reports Menu

1. Federal Program Report for Adult & Dislocated Workers
   - Region = Capital Area WF Board
   - Date = This year to date

Federal Reports

SNAP



SNAP Federal Reports Menu

1. SNAP Annual Report
   - Region = Capital Area WF Board
   - Date = Fiscal year 2023

Note: To fully display data, this report requires special processing that is not conducted in the Training environment.