Reports Training Syllabus

One day session

9:00 a.m. to 4:00 p.m. CST

Training Site Address

WIT Case Management Training Site.

What are Case Management Reports?

Case management reports are an important resource for program staff. They provide the status of participant involvement in federal, State, and local programs, they quantify and validate staff's workload and case management efforts, and they satisfy USDOL requirements.

The WIT system includes a robust reporting module that enables staff to generate a wide variety of reports according to their assigned user privileges. Users can create reports that display:

- Information about the individuals and employers using the system.
- Information on services that are provided to these users.
- Status information related to program applications, services, exits, and follow ups.
- Statistical information for leadership to analyze and evaluate agency workflows and client engagement.
- Predictive data that enable staff to anticipate performance outcomes.

In addition to the on-demand (also referred to as **canned)** reports, authorized staff may also create custom reports that meet their needs.

Training attendees will receive hands-on, instructor-led training that enables them to engage in the knowledge transfer process and to practice using the actual system construct in a **test-data** environment.

Course Objectives:

Utilizing the WIT system, this course is designed to train staff on how to navigate the reports module and generate various types of reports. Staff will also learn how to:

- Recognize components of the Reports group.
- Utilize the Reports Directory.
- Locate desired report categories and report titles.
- Generate a report.
- Perform general tasks such as downloading, emailing, scheduling, saving, and printing reports.
- Understand parent and child report designations.
- Utilize report filters such as region and office affiliation.
- Define report time parameters and report types.
- Review sample reports by category.
- Create custom reports using the Ad Hoc Query tools.

Prerequisites:

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

TX WIT System Overview Training Video.

2. Complete Cross Program Content training.