CalJOBS Help Sheet 15

How to Run Reports in CalJOBS

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How to Create a Report in CalJOBS

There are many canned (ready-made) reports available in CalJOBS. Although you cannot edit the columns of these reports, you can filter the records that will be included.

This Help Sheet will focus on the most commonly used reports that you should be familiar with. It describes how to run a **Federal Report** and a **Detailed Report** in CalJOBS step by step.
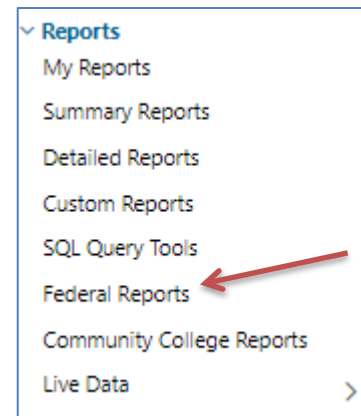
Please note due to WDACS reporting logic tailored to our local workforce area, **CalJOBS report numbers will most likely differ from the reports provided by WDACS.**

Running a Federal Report:

*Please note that only staff with Supervisor privileges are able to view Federal Reports. **Federal Reports** primarily contain high-level, federally reported numbers.

1. Navigate to the left-hand side and go to **Reports > Federal Reports**.

   ∨ **Reports**
   My Reports
   Summary Reports
   Detailed Reports
   Custom Reports
   SQL Query Tools
   Federal Reports ←
   Community College Reports
   Live Data   >

2. For this help sheet, we will explore the two most commonly accessed Federal Reports, the **ETA WIOA 9090 Quarterly** and the **ETA WIOA 9091 Annual**.

   Federal Reports

   EEO
   Display EEO Reports

   ETA 9048 Profile
   Display ETA 9048 Profile Report

   Eligible Training Providers
   Display Eligible Training Providers Reports

   WIOA Performance
   Display WIOA Performance Reports

   ETA 9127
   Display ETA 9127 - Foreign Labor Certification Quarterly Activity Report

   ETA WIOA 9090 Quarterly
   Display ETA WIOA 9090 Quarterly Reports

   ETA WIOA 9091 Annual
   Display ETA WIOA 9091 Annual Reports

   ETA WP 9002/VETS200 Quarterly
   Display ETA WP 9002/VETS200 Quarterly

   MSFW Service Level Indicators Reports
   MSFW Service Level Indicators Reports

   Veteran Priority of Service Survey
   Display the Veteran Priority of Service Survey Report

3. Click on "**ETA WIOA 9090 Quarterly**", then click on "**Quarterly Summary**".

4. From this menu, select the desired '**Date Range**', '**LWIA Region**', **and 'Office Location**'. Then click "**Run Report**".

5. You will have a listing of the federal quarterly summary with the performance items and program groups. Please keep in mind that the data must be uploaded to be available.

You may click on the blue underlined values to drill down to the specific detailed listings behind the numbers.

ETA 9090 WIOA Quarterly: Quarterly Summary

⊟ Filter Criteria

Report Period: 1st Quarter 2019

Region/LWIA: Los Angeles County WDACS

Office Location: Alhambra AJCC-Affiliate to East LA/West San Gab,Antelope Valley AJCC,East San Gabriel Valley AJCC,ELAC South Gate Specialized AJCC,ELAC Specialized AJCC,Northeast San Fernando Valley Comprehensive AJCC,Pomona Valley AJCC,West Covina AJCC-Affiliate to Pomona Valley AJCC,West Los Angeles AJCC,Whittier AJCC-Affiliate to Rio Hondo

Report Due Date: 11/15/2019   **Date:**   2/28/2020

Report Quarter End Date: 9/30/2019   **State:**   CA

Performance Items	Program Group	Current Quarter		Cumulative 4-Quarter	
(Time Period for Cumulative Performance)		Value	Numerator ------------ Denominator	Value	Numerator ------------ Denominator
	Total Adult Participants	28,828		106,484	
	Total Adults (self-service Only)	26,284		100,660	
	WIOA Adults	27,983		104,798	
	WIOA Dislocated Workers	877		1,768	
	National Emergency Grant	4		37	
	Received Training Services	502		1,789	
Total Participants	WIOA Adults	311		1,234	
(10/1/2014 - 9/30/2015)	WIOA Dislocated Workers	199		586	
	Total Youth (14 - 21) Participants	767		4,183	
	Younger Youth (14 - 18)	307		2,600	
	Older Youth (19 - 21)	460		1,583	
	Out-of-School Youth	719		2,398	
	In-School Youth	48		1,785	

6. You may also select individual measures as opposed to a summary both for the 9090 quarterly and 9091 annual reports. The 9090 and 9091 reports have the same selection criteria. In the 9091 section below, select "**Annual Summary**" to obtain the annual report.

Performance Measure: ⓘ

Advanced

- Total Participants
- Total Exiters
- Placement in Employment or Education
- Entered Employment Rates
- Retention Rates
- Literacy & Numeracy Gains
- 12-Mth Earnings Increase / Replacement
- Wages at Entry to Employment
- Veteran Priority of Service

- Employment and Credential Rates
- Average Earnings
- Attainment of Degree or Certificate
- Youth Diploma or Equivalent Rate
- Skill Attainment Rate
- 12-Mth Employment Retention Rate
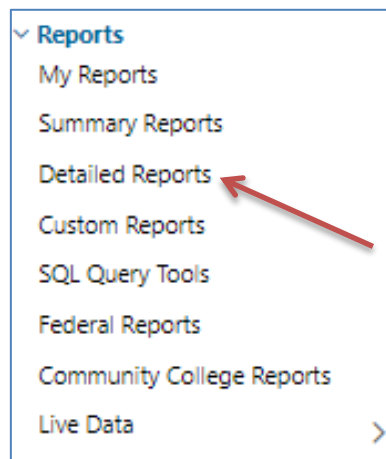- Non-Traditional Employment
- Training-Related Employment

Performance Summary: ⓘ

Advanced

- Annual Summary
- Local Performance

Running a Detailed Report:

Detailed Reports contain participant level data.

1. Navigate to the left-hand side and go to **Reports > Detailed Reports**.

2. First, let's focus on the most commonly used '**Case Management Reports**':
   a. "**Case Load**" reports will give you specific information regarding participants in your case assignment.
   b. "**Case Load – WIOA**" refers to specific WIOA reports.
   c. "**Case Load – Non-WIOA**" are generic reports and reports that correspond to Trade and Wagner-Peyser.

3. Click "**Case Load**".

Case Management Reports

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

Payment
Display Payment Reports

Predictive
Display Predictive Reports

Staff Referrals
Display Staff Referrals Reports

4. After clicking "**Case Load**", you will have the option to view different case load reports. Select "**Summary**".

Case Load:

Advanced

- Active Cases
- Application
- Case Closure Employment
- Case Closure Reportable Performance Indicators
- Co-Enrollment Summary
- Days since Last Active Service
- Enrollment in Homeless Veterans Reintegration Program
- Exit Reason Summary
- Expiring Work Authorization
- Measurable Skill Gains
- Participants by Training Occupation
- 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
- Enrollment Summary By LWIA
- Exited Cases
- Hourly Wage Before and After Enrollment
- Obtained Employment
- Participants Co-enrolled in Partner Programs
- Projected End Dates
- Soon to Exit Cases
- Targeted Measurable Skill Gain

5. In all CalJOBS reports, there are many "**Selection Criteria**" to configure that act as filters to narrow down the records you'd like to see. "**Program**", "**Location**" and "**Case Assignment**" are the most commonly used filters.

   You may choose to configure none of the filters and include all participants, but it is best to select certain criteria to limit the records in your search.

Selection Criteria
Date

| **Date Range:** | Third Quarter ▾ | 2019 ▾ | ***Not Finalized - Privileges Required.** |

Responsible Location

Region/LWDB Status: ⦿ Active ○ Inactive ○ All

Region/LWDB:
Los Angeles County WDACS

Office Status: ⦿ Active ○ Inactive ○ All

Office Location:
(Press Ctrl to select multiple items)

None Selected
Alhambra AJCC-Affiliate to East LA/West San Gab
Antelope Valley AJCC

Sort Agencies By: ⦿ Agency ○ Code

Available Agencies: None Selected ▾

Run Report

6. Once you have selected all the criteria you desire, click "**Run Report**".

7. Some reports ask for a date range. You have a variety of options to choose from, from custom date ranges to pre-selected ranges. For the current fiscal year, select "**Current Program Year**".

Date	
Date Range:	Current Program Year ▼
From:	07/01/2016 📅 (mm/dd/yyyy)
To:	06/30/2017 📅 (mm/dd/yyyy)
	Reset Dates
	The date range selection of "Today" will retrieve real time data. Otherwise, data may be up to 24 hours behind.

8. When your report has run, you will get a listing of records for the criteria you selected. Different Detailed Reports will provide different columns and data items. The blue underlined values are links you can click to view a listing of those participants.

◀◀ ◀ 1 of 1 ▶ ▶▮ ◈ 📄▾

XML file with report data   Summary
CSV (comma delimited)   Opportunity Act (WIOA) Program
PDF   oup: Adult
Excel   Department of Community, and Se
  e Valley - AJCC

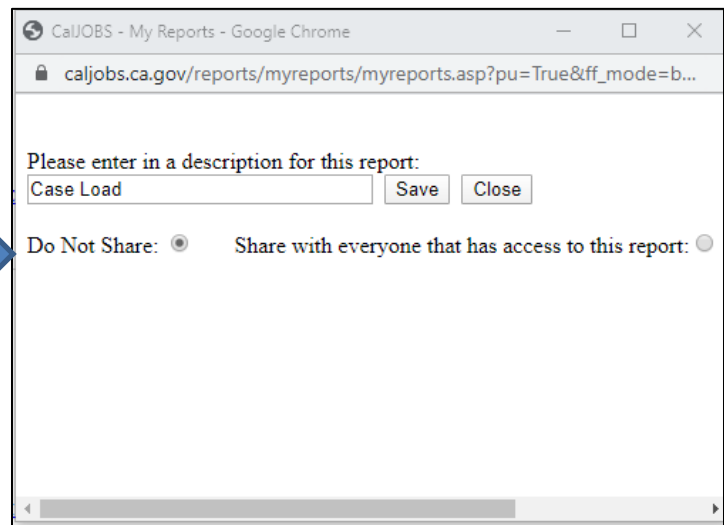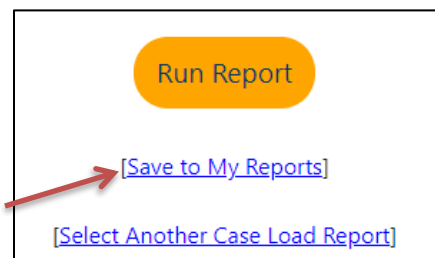| Office/Staff	Current Active Cases	Closed Cases With No Exit	In Current Qtr Follow Up	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
⊟ LAO Antelope Valley - AJCC	113	93	107	14	34	25	34
Hale, LaVeina	91	42	28	2	5	4	17
Hillman, Olivia	0	0	6	0	0	1	5
Kabba, Sondra	0	8	13	2	4	7	0
Manzo, David	2	0	0	0	0	0	0
Maravilla, Ethel	0	0	3	1	1	1	0
Medina, Alma	0	1	3	0	0	1	2
Nelson, Maria	0	9	16	3	7	2	4
No Staff Assignment	1	0	0	0	0	0	0
Pierce, Sheila	18	2	2	1	0	1	0
RIVAS, SARA	0	1	0	0	0	0	0
Solis, Cristina	1	20	16	2	6	6	2
Williams, Gwendolyn	0	10	20	3	11	2	4
Office/Staff	Current Active Cases	Closed Cases With No Exit	In Current Qtr Follow Up	1st Qtr	2nd Qtr	3rd Qtr	4th Qtr
Total:	113	93	107	14	34	25	34

9. You may export this and all reports using the export feature which is a blue floppy disk with an arrow . You will have the option to export in PDF, Excel, XML, and CSV.

10. You may click "**Reset Search Criteria**" to erase all filters and do a brand new search or "**Update Search Criteria**" to go back and change any filters you used for your report. Otherwise, you may "**Select Another Case Load Report**".

<div align="center">Reset Search Criteria / Update Search Criteria</div>
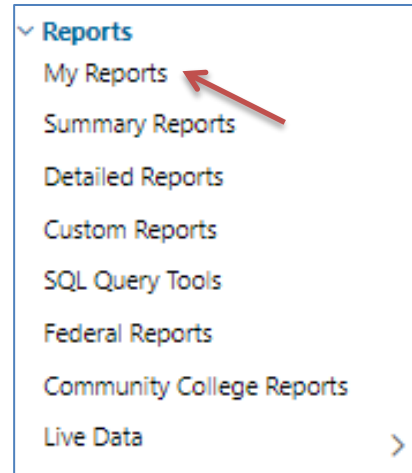

11. You may save this report to your reports by selecting "Save to My Reports" located at the bottom of the report. This will save your filters and criteria for easy access later on. Select "Save to My Reports" and enter a description for this report. You may choose to have the report public or to not share at all. Remember to save the report.

12. You may access any saved reports in the "**My Reports**" link under **Reports**.

Reports
My Reports
Summary Reports
Detailed Reports
Custom Reports
SQL Query Tools
Federal Reports
Community College Reports
Live Data   >

13. When you click on "**My Reports**" in the **Reports** section, you will find your saved reports and all the public shared reports below. You may access the shared reports, if you have the privilege for that report.