NCWorks Online Reports & Alerts

Reports and Alerts are good tools for effective case management. However, their true value lies in the diligent review and timely action taken thereafter. Reports vary significantly based on filter selections.

To schedule a report, follow the pathway below for the desired report. Prior to selecting "Run Report," choose "Save to My Reports" and name the report. Then, go to "My Reports" and find the report you saved, expand, and select "Schedule." Add your email address. You can customize the frequency and format (Excel or PDF) you would like to receive.

Enrollment

Detailed reports > Individual Reports > Enrolled Individual > Enrolled > by staff assigned > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Date Filter: Active > Date Range: Current PY > Run Report

This report will show all individuals that have been active (including those that have exited) for the selected date range. To see new individuals enrolled for a specific period, update the Date Filter to Participation Date and change the Date Range.

Exited Cases

Detailed Reports > Case Management Reports > Case Status > Case Load > Exited Cases > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Date Range: Current Program Year > Run Report

This report will show all the individuals that have exited during the selected date range.

System Closures

Detailed Reports > Services Reports > Services Provided Individuals > Service > by staff assigned > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Activity Completion Status Status: Inactive > Activity Completion Status: System Closed **Inactive** > Date Filter: Create Date > Date Range: Current PY > Run Report

This report will bring up all activities that have System Closure as the completion code.

Soon to Exit

Detailed Reports > Case Management Reports > Case Status > Case Load > Soon to Exit Cases > Days Before Soft Exit: 30 days or less > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Run Report

This report will show all individuals that are scheduled to exit within the next 30 days or less.

Days Since Last Active Service

Detailed Reports > Case Management Reports > Case Status > Case Load > Days Since Last Active Service > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Run Report

This report will show how many days it has been since an activity has been recorded/service has been provided. If a participant has not received a service in 90 days, they will exit. Also, IEPs/ISSs should be updated every 90 days and the respective activity recorded.

Last Case Note Recorded

Detailed Reports > Case Management Reports > Documentation > Last Case Note > Last Case Note for Participant > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth *or* Adult [Ctrl] Dislocated Worker > Filter By Date: Application Date > Date Range: Current Program Year > Run Report

This report will show how many days it has been since a case note was recorded for each participant. A case note should be recorded at least every 30 days.

14 Elements *Youth Only*

Detailed Reports > Services Reports > Services Provided Individual > Service > by services > Program: Title I - Workforce Development (WIOA) > Customer Group: Youth > Include Activity/Service Code: (use [Ctrl] to select multiple at once)

- o 404 – Tutoring, study skills training & instruction
- o 407 – Alternative secondary school services or dropout recovery services
- o 220 – NC Pre-apprenticeship work experience
- o 400 – Summer employment
- o 409 – Job Shadowing
- o 426 – Work Experience – Paid/Unpaid
- o 428 – Youth On-the-Job Training
- o 416 – Occupational Skills Training – On ETPL
- o 424 – NC Registered Apprenticeship Training
- o 430 – Youth Occupational Skills Training – Not on ETPL
- o 444 – Education offered concurrently as workforce preparation activities and training for a specific occupation
- o 410 – Leadership Development Services
- o CSS – Provided Supportive Service
- o CSY – Provided Supportive Service for Youth PRE-exit
- o 411 – Adult Mentoring
- o F01 – Referral to Community Resources
- o F03 – Tracking Progress on the Job
- o F04 – Work Related Peer Support Group
- o F05 – Assistance securing better paying job
- o F06 – Career development and further education planning
- o F07 – Assistance with Job/Work Related Problems
- o F08 – Adult Mentoring
- o F10 – Leadership Development
- o F11 – Provided Supportive Service
- o 401 – Pre-Employment Training/Work Maturity

- o 417 – Comprehensive Guidance and Counseling
- o 440 – Financial Literacy
- o 441 – Entrepreneurial Skills Training
- o 442 – Services that provide Labor Market and Employment information about in-demand industry sectors
- o 443 – Activities that help youth prepare for and transition to post-secondary education and training

Date Filter: Actual Begin Date > Date Range: Current Program Year > Run Report

This report will show how many times the selected service(s) have been provided, and to how many distinct individuals. As a part of the Youth Program, the 14 Elements are required to be made available to all participants.

Alerts

Alerts can be a helpful tool for good case management if used properly. Below are a few alerts we recommend turning on. To access alerts: My Staff Resources > My Alerts > Modify My Alert Subscriptions

- Workforce Innovation and Opportunity Act (WIOA) Alerts
  - o WIOA Activity Projected Start Date
  - o WIOA Activity Projected End Date
  - o WIOA Soft Exit
  - o WIOA Follow-up Alert – *especially for Youth*
  - o WIOA Literacy Numeracy Pre-Test has not been posted
  - o WIOA Literacy Numeracy Post-Test has not been posted
  - o Individuals # of Days Since Last WIOA Activity
  - o WIOA Case Note Reminder
  - o Monthly reminder of no Staff activity in the past 30 days
- IEP Alerts
  - o IEP Goals Alert
  - o IEP Objectives Alert
  - o IEP Objectives Steps Alert
  - o IEP Objectives Nearing Review Date of Completion for Case Managers
  - o IEP Objectives Steps Nearing Due Date of Completion for Assigned Case Manager
  - o IEP Goals Nearing Estimated Completion Date for Case Managers
- Case Management Alerts
  - o New Case Assigned to Staff

Set Days to *15-30 days prior* and Notify to *Everyday after*