



CHICAGO COOK
WORKFORCE PARTNERSHIP

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Sector Center Service Entry & Reports Training

May 12, 2021

Agenda



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- Jobseeker Service Entry
 - Office vs. Provider
 - Work-Based Learning (WBL) Services
 - ISTEP/OJT
 - Shared Placement
- Reports for Monthly Metrics
 - Overview
 - Participant Services
 - WIOA Performance
- Questions / Future Training Topics
- Resources
- Upcoming Trainings

Jobseeker Services – Office vs. Provider

- Office & Provider are completely different data points in Career Connect (and IWDS – state system of record).
- **Office of Responsibility** is the agency that enrolled the participant in WIOA and is the participant's primary point of contact. (Most reports show Office of Responsibility.)
- **Office** is the agency that is entering the data in the system.
- **Provider** is the agency that provided a specific service to the participant.
- This distinction is very important for Sector Centers that don't enroll participants.



Work-Based Learning (WBL) Activity Codes

Adult/DW Service Code	Youth Service Code	Activity Title
215	425	WBL-Paid WEX/Internship
223	426	WBL-Unpaid WEX/Internship
301	443	On-the-Job Training (OJT) – Private Sector
311	n/a	Customized Training
315	401	Partner Program Required: Registered Apprenticeship Program
332	458	Partner Program Required: Non-Registered Apprenticeship Program
n/a	454	WBL-Paid WEX/Internship (Youth Limited to Summer Months)
n/a	463	WBL-Unpaid WEX/Internship (Youth Limited to Summer Months)

Jobseeker Services – WBL



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- All services must include a Relationship # (on Provider screen)
- Each Provider has its own set of Relationship #s – these track to performance in IWDS
- Use the appropriate Relationship # for the customer group
- If a Relationship # is missing report it to the Help Desk. Include participant name, CC state ID#, and service.

Customer Group	Relationship # (last 3 digits)
Adult	100
Dislocated Worker	300
Out-of-School Youth	500
In-School Youth	400
Shared Placement (all customer groups)	200

Jobseeker Services – WBL



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- Participant must have an Individual Employment Plan (IEP) or Individual Service Strategy (ISS) service before any Work-Based Learning (WBL) service can be entered.
- IEP/ISS is the duty of the Office of Responsibility and should include objectives related to the WBL.
- For OJT and Customized Training, Adults/DWs must be certified for training by the Office of Responsibility.
- When adding a WBL service:
 - Select the Sector Center as the **Office** and as the **Provider**. (Note for Apprenticeships, the provider must be a DCEO approved apprenticeship program.)
 - Case note the details of the employment.

Jobseeker Services – WBL



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- When closing a WBL service:
 - Use the actual completion or drop date
 - If participant successfully completed, close as successful
 - If participant dropped, close as unsuccessful
 - Case note the closure
- If the Employer is retaining the participant:
 - enter the job to the WIOA Employment bar and
 - add a Share Placement service
- OJT & Customized Training services put Adult/DW participants in the Skills Gain measure. Sectors must coordinate with the Office of Responsibility to document and record the MSG.

Jobseeker Services – OJT



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- An Individualized Services Training & Employment Plan (ISTEP) service must be entered prior to entering the OJT service.
- ISTEP Service code:
 - 221 for Adult/DW
 - 428 for Youth
- ISTEP actual begin date, projected end date, & actual end date must all match the OJT Broker Mgmt. Signature date on the ISTEP form.
- The **Provider** is the OJT Broker (in this case the Sector Center)
- ISTEP is a same-day-service:
 - must be opened & closed on the same day
 - must have a case note

Jobseeker Services – OJT



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- When adding the OJT service, the following should match the ISTEP form as detailed in the [ISTEP & OJT Service procedure](#):
 - Actual Begin Date
 - Projected Begin Date
 - ONET Code
 - Employer Information
 - Planned hourly wage, hours & reimbursement rate
- Add the OJT job to the WIOA Employment bar

Jobseeker Services – Shared Placement

- The “Shared Placement” service gives both the Office of Responsibility and the placing agency (Provider) credit for a job placement.
- Enter a Shared Placement service in Career Connect **only when**:
 - participant has been placed in a job & employment is verified;
 - placement was made by the Sector Center; **and**
 - job has been entered in the WIOA Employment bar (by either the Office of Responsibility or the placing agency).
- Sector Center is the **Provider** of the service.
- Add a case note with the subject “Shared Placement” and include details about the placement.
- Service & job must be **entered prior to participant’s exit** from WIOA.

Reports Overview



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- All staff have access to all Career Connect “canned” reports.
- All reports have some common features:
 - Filters to tailor the data
 - Filters listed at the top of the report results screen
 - Ability Reset or Update filters
 - On screen sorting
 - Ability to export into multiple formats
- Many reports have blue hyper links to sub-reports and/or the employer / job order / participant record. (Hyper links only work on-screen – not in downloaded reports.)
- You can save frequently used reports / filters for 1-click access.

Reports Overview - Navigation



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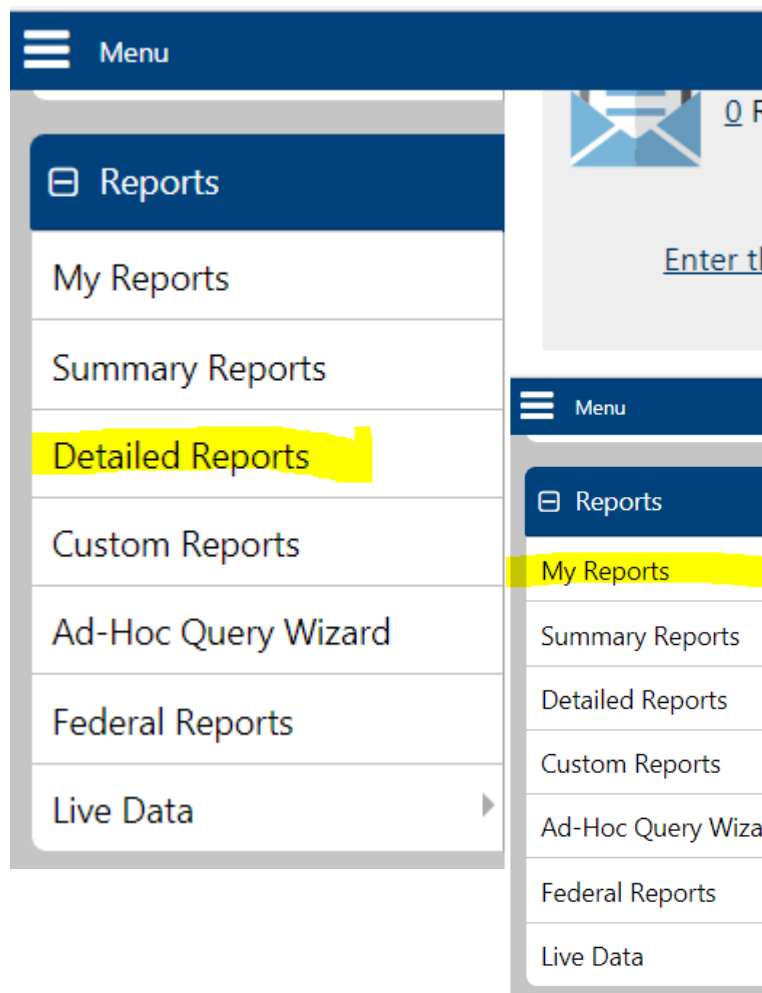
- [Case Mngt & BSR Report Guide](#) contains the key reports needed to submit monthly reports & manage your data.
- Report Title & Monthly Report includes:
 - Career Connect report title
 - applicable section of the monthly report that agencies submit to Programs
- Navigation: Provides the path to run the report
- Filters & Instructions:
 - Lists the basic filters for returning the data for monthly reports
 - Any special instructions
- Description: Brief description of the report data

Reports Overview - Navigation



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- Access reports using the Left Navigation Menu – Reports Box
- Most reports can be accessed via “Detailed Reports”
- “My Reports” is where you’ll find your saved reports.

Reports Overview - Filters



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- Filter options vary by report
- Most common filters are Office & Date Range
- Some reports have a “Provider” filter, which is important for Sectors
- Create Date / Last Edit Date pulls data based on when the record was initially created (typed in) or last edited in Career Connect.

Office Location:
(Press Ctrl to select multiple items)

None Selected
A.E.R.O. Special Education Cooperative (71
African American Christian Foundation (71
Albany Park Community Center (1262)

Filter By Date:

Create Date ▼

Date Range:

Last 7 Days ▼

From:

04/30/2019 (MM/DD/YYYY)

To:

05/06/2019 (MM/DD/YYYY)

Reports Overview - Filters



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- Some filters have a select multiple option. To select multiples, hold down the Control “Ctrl” button and click each selection.
- To return all data in a filter category, use “None Selected”.

Office Location:

(Press Ctrl to select multiple items)

None Selected

A.E.R.O. Special Education Cooperative (7101)

African American Christian Foundation (7103)

Albany Park Community Center (1262)

Reports Overview – On-Screen Tools

- Reports return with the report name and selected filters listed at the top.
- If you chose an incorrect filter, use the “Update Search Criteria” link (at the bottom of the screen) to update your filters.
- “Reset Search Criteria” resets all the report filters.

Active Cases Report

- Report Type: LWIA/Office Location
- Program: Title I - Workforce Development
- LWIA/Region: Chicago Cook Workforce Partnership
- Date Range: 07/01/2017 - 06/30/2018

Office/Location	Active Cases	Closed Cases	Exit Cases
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[Reset Search Criteria](#) / [Update Search Criteria](#)

Select Another Case Load Report

Reports Overview – On-Screen Tools

- Reports may span across multiple pages. Click the arrows on either side of the number of pages to navigate between pages on-screen.



Job Order Report - List

- Region/LWIA: Chicago Cook Workforce Partnership
- Active Date: 7/1/2018 to 6/30/2019

- Reports may display wider than your computer screen. Scroll to the bottom of the report screen to access the side-to-side scroll bar.

Emp. ID	Company Name	Industry	Contact	Location	Service Code	Staff Reported	Create Date	Actual Date
Total Rows: 1,634								

Reports Overview – On-Screen Tools

Active Cases Report

- Report Type: LWIA/Office Location
- Program: Title I - Workforce Development
- LWIA/Region: Chicago Cook Workforce Partnership
- Date Range: 07/01/2017 - 06/30/2018

Office/Location	Closed Cases	Exit Cases
Erie Neighborhood House-Healthcare Bridge (7176)	0	0
Phalanx Family Services (1002)	0	0
ServiceWorks (1026)	0	0

Click on any
column header
to sort by that
column

Active Cases Report

- Report Type: LWIA/Office Location
- Program: Title I - Workforce Development
- LWIA/Region: Chicago Cook Workforce Partnership
- Date Range: 07/01/2017 - 06/30/2018

Office/Location	Active Cases	Closed Cases	Exit Cases
A.E.R.O. Special Education Cooperative (7101)	51	10	10
African American Christian Foundation (7103)	31	1	1
Albany Park Community Center (1262)	23	0	0
Alternative Schools Network (1000)	281	0	0
America Works of Illinois (7012)	59	0	0
Arlington Heights Workforce Center (8100)	604	18	18
Asian Human Services (1501)	56	1	1
Aspira, Inc. of Illinois (1060)	66	0	0
Aunt Marthas Youth Services (7105)	68	5	5
Bethel Community Facility (7130)	41	3	
Boys & Girls Clubs of Chicago-S. Emerald St (1127)	64	4	

Reports Overview – On-Screen Tools

Active Cases Report

- Report Type: LWIA/Office
- Program: Title I - Workforce
- LWIA/Region: Chicago Cook Wc
- Date Range: 07/01/2017

Office/Location	Active Cases	C
Erie Neighborhood House-Healthcare Bridge (7176)	2	
Phalanx Family Services (1002)	44	
	-	

Click on blue #'s
to see detailed
sub-report
(child report)

User ID	Stat
258041	
72631	389500
47817	381012

Click on blue
User ID to go to
customer's
record

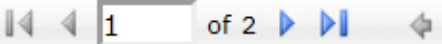
Click the on-screen "back" button to
go back to the summary (parent)
report



Reports Overview – On-Screen Tools

- Click on the arrow next to the disk icon towards the top of the report to select a download option.
- Excel or CSV are the best options for manipulating the data.

Staff Email Search 

1 of 2 

Active Cases Report
Type: LWIA/Office Location
Title: I - Workforce Development
Chicago Cook Workforce Partnership
Date: 07/01/2017 - 06/30/2018

Office/Location	Active Cases	Closed Cases	Exit Cases
Erie Neighborhood House-Healthcare Bridge (7176)	2	0	0
Phalanx Family Services (1002)	44	0	0
ServiceWorks (1026)	2	0	0
LaGrange Department of Special Education (7139)	44	11	11
Maywood Workforce Center (7200)	385	32	32
Boys & Girls Clubs of Chicago-S. Emerald St (1127)	61	1	1
Erie Neighborhood House - Mnfg Bridge (7174)	1	0	0

Reports Overview – “My Reports”

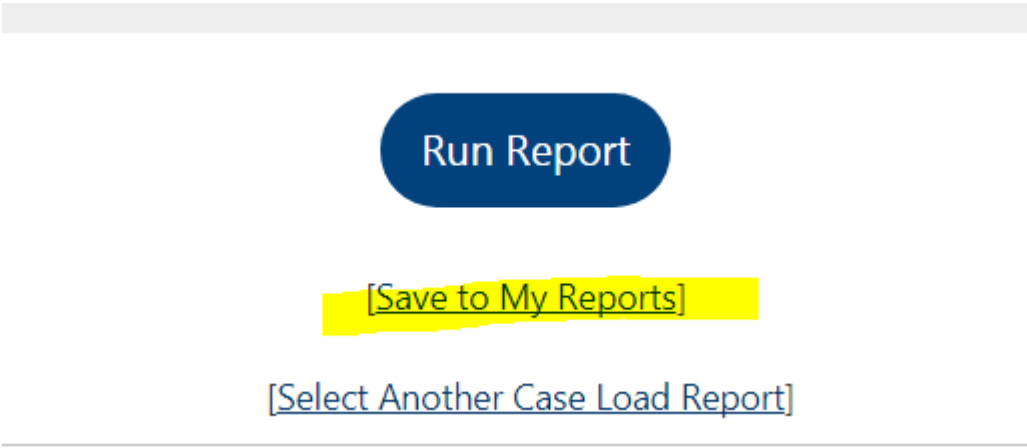


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“My Reports” allows you to save reports that you run frequently & run them with one click:

1. On the reports filter page, set your filters.
2. Click “Save to My Reports”.



Run Report

[Save to My Reports](#)

[Select Another Case Load Report](#)

Reports Overview – “My Reports”

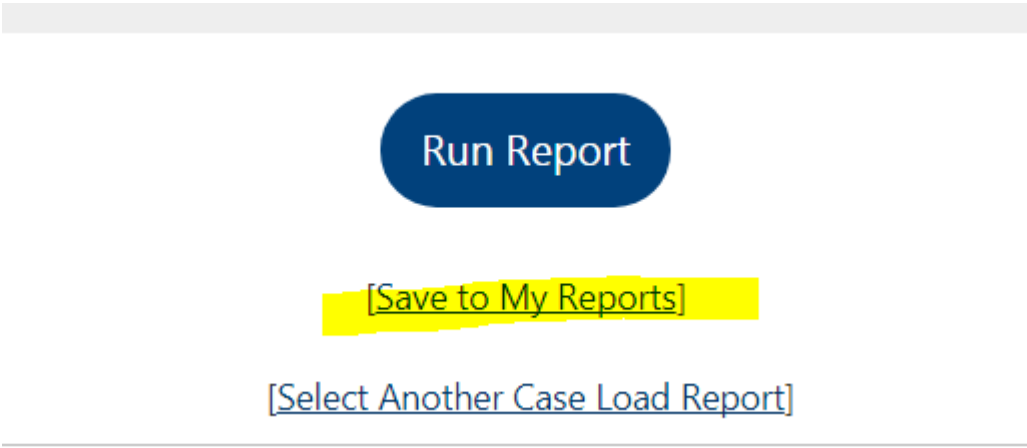


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Run Report

[Save to My Reports]

[\[Select Another Case Load Report\]](#)

Reports Overview – “My Reports”



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3. A pop-up box will appear. Enter a descriptive name for the report. (For example, “Adult Active Cases-Current Program Year”)
4. Keep “Do Not Share” selected
5. Click “Save”

A screenshot of a web browser window titled "CareerConnect - My Reports - Google Chrome". The address bar shows a secure connection to "https://www.chicagolandcareerconnect.org/reports/myreports/m...". The main content area contains a form with the heading "Please enter in a description for this report:". Below this is a text input field containing "Adult Active Cases-Current PY", followed by "Save" and "Close" buttons. At the bottom, there is a section with a yellow highlight around the text "Do Not Share:" and a selected radio button, followed by the text "Share with everyone that has access to this report:" and an unselected radio button.

CareerConnect - My Reports - Google Chrome

Secure | <https://www.chicagolandcareerconnect.org/reports/myreports/m...>

Please enter in a description for this report:

Adult Active Cases-Current PY

Do Not Share: ☒ Share with everyone that has access to this report: ☐

Reports Overview – “My Reports”



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6. To retrieve your report, go to *Reports > My Reports > My Reports (section)*

The screenshot shows a web application interface. On the left is a vertical navigation menu with a dark blue header 'Reports' containing a minus icon. Below it are several menu items: 'My Reports' (highlighted in yellow), 'Summary Reports', 'Detailed Reports', 'Custom Reports', 'Ad-Hoc Query Wizard', 'Federal Reports', and 'Live Data' (with a right-pointing arrow). The main content area on the right shows the 'My Reports' section, which has a grey header with a minus icon and the text 'My Reports:'. Below this is a table with a dark blue header. The table has two columns: 'Report Description' and 'Action'. The first row of the table has a yellow-highlighted description 'Adult Active Cases-Current PY' and three blue underlined action links: 'Update Filters', 'Display Report', and 'Edit'.

Reports Overview – “My Reports”



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7. Click on “Display Report” to display with the original filters
8. Click on “Update Filters” to update any filters. (Note if your original date range was a custom range through the current date, you will need to update the “To” date every time you run the report.)

☐ My Reports:	
Report Description	Action
Adult Active Cases-Current PY	Update Filters Display Report Edit

Sector Reports for Monthly Metrics



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Report Metric	Report Name	Report #*
WBL-Customized Training & OJT	Training (filter for OJT & Customized Training codes)	8a
WBL-OJT	On-the-Job Training	8b
WBL-Work Experience	Work Experience	8c
WBL-All	Services Provided Individuals (filter for all service codes listed in slide 4)	7

**Report # refers to the number in the [Case Management & BSR Report Instructions](#).*

Sector Reports for Monthly Metrics



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Report Metric	Report Name	Report #*
Businesses Receiving Services	Services Provided Employers	BSR-1
New Business Registrations	Registered Employer List	BSR-8
Shared Placements	Services Provided Individuals	5b
Job Orders	Job Order by One Stop Location	BSR-3
Events (in Career Connect)	Detailed Event List	EV-1
WIOA Performance	IWDS Performance Report	PM-2

**Report # refers to the number in the [Case Management & BSR Report Instructions](#).*



- **ISTEP & OJT Service Procedure:**
<https://workforceboard.zendesk.com/hc/en-us/articles/115003199131>
- **Shared Placement Procedure:**
<https://workforceboard.zendesk.com/hc/en-us/articles/360029587491>
- **WIOA Services & Definitions (Jobseeker)**
<https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>
- **Measurable Skills Gain (MSG) Procedure:**
<https://workforceboard.zendesk.com/hc/en-us/articles/360003921472>
- **Case Management & BSR Report Instructions:**
<https://workforceboard.zendesk.com/hc/en-us/articles/115002782311>
- **WIOA Performance Webinar Series:**
<https://workforceboard.zendesk.com/hc/en-us/articles/360059762371>

Upcoming Trainings



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- **IWT Policy and Procedures 5/20/21**

<https://attendee.gotowebinar.com/register/5858424866948032016>

- **BSR Reports Training - 5/26 BSR Meeting**

<https://attendee.gotowebinar.com/register/3417302340343705100>

- **Career Connect Business Services Training 5/27/21**

<https://attendee.gotowebinar.com/register/4365821334807472651>

- **Customized Training 6/1/21**

<https://attendee.gotowebinar.com/register/4460653113194877964>

- **On-The-Job Training 6/8/21**

<https://attendee.gotowebinar.com/register/4897422012701037324>



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Questions?



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