

## GPMS Training Module 5 - Reports Transcript 5.28.2025

**Burnett, Lauren S - ETA CTR 0:03**

On your camera, at which time the agreement prompt will pop up on your screen where you can accept.

So I'll give you all a moment to do that.

Just a quick review for some housekeeping guidelines.

This meeting is now being reported and a recording of this session will be posted to the older worker COP.

We currently ask that you keep your microphones muted throughout today's session to ensure seamless experience for everyone.

Should you have any questions, please type them in the chat and at the end of our session we will acknowledge them in the order of which they are received once again.

Thank you for joining our GPMS training, and I will hand it back to Michi.

**McNeace, Meche - ETA CTR 0:43**

Thanks, Lauren, and welcome everybody to our GPMS final training, which is going to be all about reports.

Alright, so what I'm going to do is that I'm going to pass the baton over to Joyce.

**Barcley, Joyce M - ETA CTR 1:06**

Great. Thanks, Michi, and good afternoon, everyone.

Thanks for joining us today for reports. My name is Joyce Barcley.

I'll be your trainer today, with Chanel Davis demonstrating in the live GPMS training site.

Excuse me.

This training module will provide an understanding of the reports available in GPMS.

We will walk through the reports to develop a comfort in their location, their purpose and how they can be used for case management and desktop monitoring purposes. By the end of today's session, users should have a better understanding of the reports that are available, how they can be used to efficiently manage required case management activities and monitor program success and meeting goals.

There are two locations where reports are available.

They're available from both locations and will be reviewed shortly. The reports tab of the navigation bar, which will look at in a moment and on the admin console from the navigation bar's reports tab. We will be accessing 2 report types, user organization and equitable distribution. These reports are available for all user roles.

As you can see from the listing, user organization reports are tools for day-to-day case management purposes and can be used for some desktop monitoring while the

equitable distribution reports focus on the authorized and modified positions for each county and track the program's effectiveness to fill those positions.

The Admin Console reports can be generated at any time. However, not all users have access to all the reports.

The extracts the internal QPRs frozen QPRs and nationwide QPRs are available to all users.

The WIPs, QPR and QPR addendum are used solely by the grantee administrators for quarterly reporting into WIPS. A separate training was provided earlier this year and is available along with the WIPs tip sheets on the workforce GPS older worker community of practice.

OK, let's get into the meat of today's session by working in the live system over to you, Chanel.

Great. We see your screen.

OK, for today's review, we are logged in as a grantee administrator to facilitate reviewing all the reports when logging into GPMS. The landing page is always the cases page. The blue bar at the very top of the page is the navigation bar.

So we're going to begin with the reports available from the navigation bar by clicking the reports tab.

Beneath the navigation bar, you'll see two tabs.

Report tabs, one for user organizations and the other for equitable distribution.

By default, the report tabs open displaying the user organizations and its filters.

So let's move through that by getting setting some of the filters, the nationwide radio buttons default to no, which is where it needs to be. The yes option is not for granting users.

Let's enter the grantee and sub grantee and we'll use today older worker association as the grantee and Alliance for employment as the sub grantee.

Just a note that grantee administrators don't need to select a subgrantee or they can select more than one subgrantee to run their reports.

So let's click search to display the report headings.

There are three report categories.

There are participants actions.

And currently there are no employer reports available, so we won't be going through those.

We'll review both the participants and the actions reports beginning with participants.

So, let's click on the 1st Participant report, which is participant current exit detail.

The report filters are displayed only one filter active filter for assignments is required.

This provides a lot of flexibility in the report content, as we'll see as we're reviewing the filters.

There are two options for the active filters for enrollment. Then click on that. Show currently active enrollments only and show exited enrollments only. These options will provide a listing of either currently enrolled or previously exited participants.

There is 3rd option however, which is leaving the field blank.

That way you can generate a list of all participants active and exited.

The active filters for assignment is the only required filter with the options to show current latest assignment only for each participant or show all assignments which will display all assignments for each participant. The date ranges can be used to narrow those results further for the program year or any desired time frame.

You'll notice as we move through the participant reports that filters work pretty much the same way with some filter criteria being geared toward the activity for that topic, like this one, enrollment and exit and some criteria geared toward time frames.

So you'll just notice that as a common theme, as we go through all of these reports case managers can use this report to run lists of all participants current and exited, and to review enrollment levels for specific time frames.

It can also be used to view exits for a given time frame, like perhaps you want to see how many participants exited for employment for or for other reasons. This could be helpful in identifying prevalent reasons for exit besides employment, but for demonstration purposes, let's leave the filters blank and select show all assignments.

We won't use the date field and then click search.

So once the filters have been set, the report page opens again.

This is how all the reports work in the sections that we'll be reviewing. There are two sections to this participant, current and exit detail report. The results summary provides aggregate information for the selected filters which can be used for a quick review, such as seeing the current levels or to determine the number of exits and their reasons.

The summary can be exported by clicking the export button.

The second section is the results detailed table which lists each individual case alphabetically by first name. As with most tables in GPMS, many columns can be sorted up and down by clicking on the column headings such as participant name or status.

Let's click on status heading to demonstrate.

So you see, when you click on it the first time it alphabetizes everything.

The statuses alphabetically and if you click on it again, it'll reverse the. Yeah, it'll reverse the alphabet alphabetization and start with the last letter.

And let's go over to the participant.

We can also filter on that.

And that just set it back to the alphabetically by first name.

The table displays only a portion of available data that is available in this report. To see

all of the data open the participant's details by clicking the four horizontal lines icon to the left of the participants name.

This icon is used to display more detailed information beneath the current table.

So let's click on Jenny's Roberts icon.

And then Scroll down to see all the information.

Great.

Remember, when setting the report filters for only the current assignment, only the current assignment will be displayed. When setting the filter for all assignments, all assignments the participant had will be displayed in chronological order, beginning with the most recent assignment.

This participant has had two assignments, and both are displayed. Each assignment is distinguished by its unique assignment ID number and the assignment details show the enrollment date, the number of days in enrollment, the number of days on leave of absence. If there are any, the three job interest codes. If those were entered the assignment date, the assignments start and end dates, and the days in that assignment and host agency information.

It's a lot of good information there.

Each of the individual assignments can be exported.

You can see the small export button for each assignment if you wanted to do that, but let's scroll back up please to the results details.

Because that table can also be exported and will contain all the information we just reviewed in the individual participant assignment details.

So let's do a quick export by clicking the export button.

After clicking the button, the report begins processing, click refresh periodically until the name appears. The file name OK, and then you can click on the file name to open the report in Excel.

So let's click on that.

And we're going to download.

It just takes a second to open.

And this same download process is used for all reports that contain the export button.

It's not opening. There we go.

Just took a minute.

There we go. When the reports are downloaded, the data can be sorted in Excel to meet the user's needs.

We'll slowly scroll across the screen to get an idea of the data contained, but you've already seen it in the detailed summaries.

So this is all of the information that you can see.

We have the days looking at column U got days on leave of absence.

We have the job interest codes.

We have the assignment dates start and end host agency information, so a lot of really good information that you can be using to run these reports.

Great. Thanks.

So let's close this this report.

Whoops. And then let's close the download screen to return to the reports page.

OK.

Let's enter the grantee again, which is older worker association and the sub will be alliance for employment and then click search.

And we have our list of reports again.

Now let's select waiver of durational limit report.

This is one of two reports for which refresh is clicked to open the page.

This step was added for reports that took a long time to open to increase the speed of accessing the information.

So let's click on refresh until the report opens.

It may take one or more clicks.

Oh, it opened right away. Good. OK.

Just a reminder, as mentioned in prior trainings, there are yellow note boxes throughout the system that provide helpful information.

In this instance, the note advises the user to click on the field count numbers which are blue numeric hyperlinks to see the participants included in that count.

So we'll do that in a minute. But before doing that, let's review the types of information available in the results summary.

The left column displays the number of days and months from the durational limit date. These counts are very helpful for identifying participants who are approaching one year from their durational limit date, which were case manager could trigger the beginning of those participants employment plan to transition from the program.

Or you can focus on participants who are 30 to 45 days from their durational limit date, which would trigger sending their durational limit letters.

Or you could focus on 6 to 9 months from the durational limit date as a reminder to update transition IEPs.

So lots of good ways to use this report. The right column also displays time frames and the numbers of participants with at least one waiver factor update in the current program year.

Remember, waiver factors are to be updated annually, and this report identifies those still needing waiver factors entered.

This information is important for grantees whose policies allow extensions to the durational limit based on their waiver factor updates. If you are uncertain about the

grantees policies allowing extensions to the durational limit, please contact your grantee, administrator cause they're the ones that can provide you with that information.

As with most tables, the results summary can be exported into Excel following the same export process.

But let's scroll back up and let's click on the 1st results hyperlink duration limit for all active participants to see the information it contains.

After clicking it, we Scroll down to see the participant table duration and limit for all active participants.

Again, there is a finite number of columns displayed on the table, but there are two very important ones expected to reach durational limit and the date the termination letter is due to be sent.

This gives a case manager a quick list of participants who will need to begin transition planning for their durational limit.

The participant information table can also be exported.

There's the export button and the exported report will display all the same information contained in the participant details. So, to see the participant details, let's click the four horizontal line icon in front of Martin Richards.

That's a good one to display the full details and scroll down to view them.

As you can see, the details include the participants basic information, their characteristics, the waiver factors, and the last time the waiver factors were updated.

You can export the data for the individual participant by using the export button in the participant's detail section, or you can export the.

Detailed information for all participants by clicking the export button at the bottom of the participant table.

Detailed tables. So let's click that.

Export the participant table.

Export to see the report of all participants.

So the pop up box asks to confirm to leave the page, so click yes.

And like all reports, all exports, I should say click refresh until the file name appears and then click the name to display the download and then open.

Then you can open the report.

And it just takes a second to open that report.

Here comes OK, so as we slowly scroll through the headings, you'll see that it contains all the data that we viewed in the individual case details.

Participant contact information, their address, their case manager.

Application date days left in the program enrollment date.

The day expected to reach durational limit and the duration of limit due date, their age

and then we get into the we get into the waiver factors.

OK, we can close this report.

And let's click on this pages back arrow.

To return to the reports page.

Oops, there we go. OK again.

Let's enter the grantee older worker association and the sub-Alliance for employment and click search.

This time we're going to select the participant hours report to display the report filters.

There we go. As we've seen with most filters, some are required as identified by the asterisk, and some are optional. The only required field for this report is program year. However, optional filters do narrow down the search and here we have the ability to specify quarter.

To specify a specific participant.

Or to search by a status of active or exit.

In addition to those three options, you can also use one or more of the three radio buttons which are current quarter and that will display only participants who are active or exited in the current quarter. Year to date displays all participants who were active or exited in the.

Current program year and only zero hours which displays only those participants who were active but without hours entered for the selected time frame.

The radio buttons are not mutually exclusive.

And the combination may be used, such as if you wanted to do year to date and 0 hours to display all participants for a current program year that have no hours entered.

This is a very helpful feature to ensure that all community service and other categories have been entered.

Using the filters also limits the number of cases displayed, which is very helpful for big grantees and sub grantees with large numbers of participants that they're working with.

Let's walk through using the radio buttons.

Let's set the program year for 2024.

And select the current quarter radio button.

Now notice that once the current quarter was clicked, the quarter field above auto populated to four. Since we are currently in the fourth quarter.

OK, this report. OK, and let's click search.

Now we'll scroll down a little bit.

So this report has three sections and displays information based on those filters that we set. The summary details displays aggregate results of all the filter search you can see there are three enrollments.

The summary hours table displays aggregate totals by quarter and by hours categories.

Our filter was for the current or fourth quarter and we see that the hours that were entered are displayed.

Both the grantee summary and the case summary tables can be exported together by clicking export at the bottom of the grantees summary hours table.

The third report section is the case summary table, which displays information by individual participant and is showing there are three enrollments which matches what was displayed in the grantee summary.

OK.

Let's go back up and click the reset on those filters.

And that select program.

Year '24 again.

Actually, no, it's not. Leave that blank.

OK.

Just click on year to date.

And notice that PY 24 auto populates because the current year is PY 24. Now if you select search so we can open up the report.

Again, you'll see the three sections.

With the grantee summary details showing the enrollments, the active and exited for the quarter. It also shows all the hours that were entered for the participants and as you scroll down the participant table, it shows we see we have 11 participants in the summary and you'll see at the bottom of the page it shows there are 11 participants that are displayed.

The last one just happens to be on the next page.

So let's scroll back up and hit that reset again to try out that last radio button which is which is zero hours.

Let's pick program year 24.

Q2 quarter 2.

So we're picking current program year the second quarter and we want to see only participants that have zero hours, which means they would be active or exited that quarter and they have zero hours entered.

So let's click search.

OK, the grantee summary details show that there are two people that actually meet that criteria.

And if we scroll down to the or if we look down at the grantee summary hours table we were filtering on Q2 and we see all the Q2 hours are zero because that's what we asked to see only zero hours.

Now let's talk a little bit more about that case summary table, because it has some pretty neat features.

I love that alphabetic selection section on top, so clicking any letter of the alphabet displays only the participants whose last name begin with that letter.

This is very helpful for users with large programs and avoids having to scroll through pages of names to find those needing to be reviewed. So, for demonstration, let's click N.

You see only one participant with the last name beginning with N.

Details for the individual case can be displayed again by clicking the four horizontal lines before the before the name. So, click the icon and scroll down to review the results.

We see the participants host agency and assignments start and end dates. Although we selected the second quarter in the filters, the hour table displays all four quarters.

Remember, this is a view only report and we cannot enter the hours here.

However, you can take down the participants ID number and enter the hours in that case. If you want to do it that way or you can export the case summary table.

Above, which provides a listing of all the participants that meet that search criteria and in this case would need hours entered.

So let's scroll back up and export the case summary table first.

Start by unclicking the end to make sure we get everybody.

Then click export.

Oh good.

Now we click refresh and then.

OK.

Click refresh again.

OK, this may take a while. So, for the sake of time we'll just say that all the information we saw in the participant details is represented in that report. So let's just yeah, let's conclude and review the participant reports and move to the.

Let's see if you can close here.

OK, great.

Now let's move to the participant reports again by entering.

The Yep, you got it.

Our friends there click search.

And now we're going to work with the actions reports.

Now we'll focus on the participant action report, which is the very first actions report.

The participant actions report helps the program track and schedule required activities for participants.

Filters are used to select one or more of the four action categories.

IEP recertification, physical or waiver and safety consultation.

All but the recertification are also participant required actions or PRAs.

All of the activities can be conducted at the same time for case management efficiency. The IEP update is conducted more than once a year, but by combining that review with the other activities, it can also help identify support needs that could be included in that participant's.

There are also date range filters to help narrow the search if that's what you wanted to do.

And the reset button is available to clear the filters and begin again.

So let's select all four actions and click search.

We're not going to select any dates.

OK, this report screen contains 2 sections, the summary section and the detail section. So this should start sounding familiar now that reports begin with summaries and then move into the details.

The summary section displays the actions that were set in the filters.

It shows the aggregate number of enrollments and the number of pending actions by category.

It also displays the number of past due actions by category.

The details section right below displays all participants with required actions.

A couple of things to note. Include the alphabet section. Again is available to select the specific letter of the last name to quickly access a case.

And when there is more data that can be displayed on the screen, you can scroll down and see there's a scroll bar at the bottom.

So you can then see all of the data that is available on the screen.

There's only one export option for this report.

The entire report is back at the top.

The entire report with both the summary and details can be exported by clicking the export button that we're seeing there above the table.

So let's click that export button to take a look at this report.

Now here all we have to do is click the export download.

On the confirmation page and then we can click on the file to open it.

And again, these take a little a minute or two few seconds.

There we go.

OK.

So the downloaded participant actions report contains 2 worksheet tabs at the bottom, the summary. Oops.

The summary and the details.

The summary tab displays the aggregate number of actions, while the detail tab displays a list of participants and the action status.

Let's see if you want to open that up, yeah.

Great.

So as we scroll through, we see that we have the participant information, we have the dates.

The last update, the date due for the next action or the actions next due date I should say are all displayed.

And this report can help case managers schedule participant meetings to ensure timely completion of required actions.

So it's this is a very handy report. OK, we can close this report now.

And return to the system.

And click the close to return to the report page.

And we'll select our friends again at older worker association and Alliance for employment and click Search.

The next actions report is most in need waiver factors.

Click on that.

A reminder to read the yellow notes, or in this case introduction box, which states this report will display all active participants with at least one missing waiver factor or waiver factor date in the last two program years.

So those report notes are always very helpful, because if you're wondering, we forgot what the report provides. The note will help you remember, OK, the program year is optional and has three options. The current program you want to click on.

Yeah, the current program year.

The prior program year or both years leaving the option blank will also default to both years.

The participant details section which is required.

Has two options which are to show current participants with pending waiver factors and show all participants.

Let's select program year 24.

And show all current participants and click search.

OK.

Scroll down a little bit.

OK.

The waiver factors action report can help case managers track when the waiver factors were last updated and those participants who may be eligible for a durational limit extension.

This report has two sections.

The results summary and a participants table.

The results summary displays the number and percentage of participants one year away from their durational limit date and needing those needing waiver factors.

Needing waiver factors, updates and those with waiver factors.

Updated in the current program year.

The summary also shows the number and percentage of participants.

Who are beyond their durational limit.

Whose waiver factors are current and the number of participants who have already had an extension with waiver factors that have been entered for the current program year.

So you can get a lot of good summary information there.

Below the summary, the participant table displays the list of participants included in the summaries, enrollment count and shows if they are within one year of their duration of limit date.

Because the column and the date each is expected to reach their durational limit.

As with all participant tables containing the four horizontal line icon, clicking the icon will display the details for that participant.

So let's click on Martin Richards, who is within one year of his duration, a limit.

Scroll down to see the results.

Great.

We see that the participants waiver factors are current for the program year and we also see that he has no waiver factors to possibly qualify for a duration of limit extension.

So let's take a look at the report and click the participant table.

Export just to see what it looks like in the report fashion.

So if you have more than one person, you'll get all the information and we click the refresh button until the name appears and then we click the name.

And then we open that file.

Great. The waiver factors report has two worksheet tabs as well, the summary and the details.

The summary worksheet displays the same summary information previously shown on the report page.

The details worksheet provides all of the details for the participant and the last date of the waiver factors in one location for easy use. So, as we scroll through you can see there's multiple participants listed here, and you can find for each of them if they're within one year of their duration of limit. You see the last. The third one is yes, and then we also look and we can see we have to open some of the waivers.

So if you look at M column M.

And open those up.

Yeah, and do and you can see each column will then have the waiver factor and the date was last updated and all his waiver factors are no.

So he would not qualify for an extension should that grantee offer such an option.

OK, we can close this workbook and return to the download page and we can close that

out too. To return to the reports page.

And our old friends, older worker association and alliance for employment, and then click search.

The next report is employment. Follow up report.

And again, the yellow this yellow introduction box actually contains a sub introduction box with very helpful explanation for all the filters.

So if you ever forget what these filters do, there's a great explanation.

Like the program year, the report will display all follow up activity for scheduled dates in that program year and the follow up categories are displayed only follow ups in the selected categories.

Selecting all for the categories displays all three.

Follow-ups and then the follow up status displays a subset of records based on the selected statuses.

These statuses display data based on the date the report is run.

Now this is kind of key.

So all of these are based on the date the report is run, so pending follow up is when the report is run between the scheduled date and the end of the reporting quarter.

Overdue follow up is when the report is run between the last day of the due quarter and the relevant follow up expiration date.

Expired follow up is when the report run date is past the last date that the follow up can be completed.

A successful follow up is when positive data has been entered timely and negative.

Follow up means no data has been entered or the follow up criteria was not met.

That's a lot of information, so let's run a report to get a better idea of how it's used.

All the filters for this report are required fields as designated by the asterisks.

For the program year, let's select PY 24.

For the category, let's select all the categories we want to see everything.

OK. And the same thing for the follow up the statuses, let's click everything.

If you want to clear the filters, you can click the reset button, but we want to see everything, so let's click search to display the results.

And before scrolling down after the results OK before scrolling down, notice the export button is for. This report is under the filters, and we'll use that in a minute.

So let's scroll down.

To see that this report has two sections, summary and follow up results details.

The summary displays aggregate results for the selected follow up statuses. Since we selected all of them, the summary displays the number of participants whose follow-ups are pending, overdue, and expired. The number of successful and negative follow-ups. If you need clarification for any of the summary information, notice that.

There are little question marks at the end of each line, and you can click that to display a brief explanation.

**Barcley, Joyce M - ETA CTR 38:32**

Also very helpful thing to have.

OK. The follow up results details, as we look down the report section displays the results by participant since the results contain more columns than can be typically seen on a device. Use the scroll bar at the bottom of the screen to view all of the columns.

In this example, only one participant is listed.

**Barcley, Joyce M - ETA CTR 38:59**

And using the scroll bar may be sufficient for your needs. However, when working with many participants in follow up, it may be easier to export the data.

**Barcley, Joyce M - ETA CTR 39:08**

Data into Excel, so let's click the export button to open the exports download page.

**Barcley, Joyce M - ETA CTR 39:18**

OK.

So we click the refresh until the name appears and then we click the file name to open the downloads window and then click on the open file.

OK, this is a report we ran earlier.

To format it for demonstration purposes.

So we're gonna pull a report that we saved for you, OK?

So if you want to scroll all the way to the left to the beginning of that, yeah, great.

OK.

So this was formatted for this demonstration.

Remember we selected program year 24, so only the follow-ups due and program year 24 will be displayed.

We selected all three of the follow up categories and we checked all of the follow up statuses to see everything pending, overdue, expired, successful and negative.

This demo report shows the participant contact information first.

And then it shows the exit date. This and then begins the follow-ups. The scheduled follow-ups and last is the employer information.

So when you're contacting the employer, you have the information right there. It's all

available.

OK, so for this example we're going to focus on the follow up section which are columns L through T.

Follow up one was due on July 1, 2024 and was successfully completed on October 24, 2024.

You can see it says success in the follow up status.

Follow up two was due on October 1st, 2024 and was successfully completed on October 24th of 2024.

Follow up three, however, was due on January 1st, 2025, but the data has not been entered, so it's blank.

This reminds the case manager of the needed follow up or that the data hasn't been entered and needs to be entered to obtain credit.

Remember, if it's not in the system, it doesn't exist for reporting purposes, so it's really important to make sure all that data gets entered.

OK.

Let's close this report and return to the report download page.

And we can click close to return to the report page.

And back to our friends, older worker and alliance for employment and click search.

OK.

Now we're moving to the final actions report, which is assignment by host agency. From this report, a user can determine the number of participants assigned to a host agency.

This is the second report for which refresh is clicked to open the page.

So let's just refresh to open that report. Great.

OK, the assignment by host agency report filters are not required, but when used can help expand or reduce the results displayed.

Let's review the filters, which are not mutually exclusive and can be used in any combination.

Display active host agencies only will display the host agencies having been checked as being active. These active host agencies may or may not have participants assigned to them.

Display active assignments only will display only host agencies that have participants currently assigned.

The assignment active from and through date filters can be used to identify active host agencies and or active assignments for a given timeframe, and the three show filters. So notice the first column both say display the last column, all say show.

The three show filters show summary report, show, organization, summary and show most recent assignment only.

Will determine the information that is displayed and will be included in the export

download.

Notice that three filters are set as defaults, display active host agency only.

Show report summary and show organization summary to remove these filters just like all filters you so you can set your own. Click the reset button.

A note appears stating either a report summary or organization summary must be selected to display results.

So let's click all the filter checkboxes, let's click display.

Yep, click them off.

Don't click the dates.

And click search to review the results.

OK, before moving down the page, notice the export button is above the report summary and below the filters.

This report also has two sections, the report summary and the organization summary.

So the report summary displays the number of host agencies, the number of active host agencies, the average number of participants and the average length of assignment in days.

From this we know at a glance that there are five host agencies that all five are active.

Each host agency has had an average of 1 participant and the average assignment length is 1043 days.

Note that this information is from our training site and not a true reflection of the results programs we'll typically see.

OK, moving down to the organization summary, we see that it provides a table listing each host agency, their host agency ID, their FEIN, their address, the type of agency, the number of active participants and the number of inactive participants.

Notice each organization has four horizontal line icon and we know clicking that will provide that organization's details below the summary.

So let's select Community Action Services icon since they have two active participants and click on their icon and then scroll down to see the results.

OK.

We did that the details.

For the Community Action Services shows both the organizations active participants.

Using the scroll bar at the bottom of the page we can see all of the data for those participants. However, it may be easier to view the information in Excel, so let's scroll back up to where that export button is and we can click on that.

To export the report into Excel.

OK, we click refresh until we get the name.

There we go.

And then we click on the name.

To open the download window and open the file.

But we're not going to open this live file.

We're not going to.

I should have told you that before.

Sorry, Chanel.

Normally you would open, you would refresh, you would click and then you open the downloads.

But we're going to open a report that was previously downloaded.

And we wanted to download it for demonstration purposes.

OK.

It's very good.

So notice at the bottom the report has three worksheet tabs based on the show filters that we previously selected, we selected report summary and that worksheet displays the information we saw.

In the summary section.

The organization summary worksheet displays the information we saw in the organization summary and the participant summary contains all the information we saw. Scrolling through the details element.

So you may recall, during prior training sessions, users were encouraged to enter all data that they have even when the fields aren't required.

So looking at the participants summary and scrolling through it.

As a case manager, I might have found it would have been really helpful to have the CSA titles entered for all the participants, which would not only let me know what those participants are doing, but it would also let me know the type of assignments that that host agency offers.

Also, it would have been helpful might be helpful to have the participants schedule entered because just think if you were trying to schedule time to meet at the host agency with the participant having that schedule information would be really handy because it's all in one location and you can just from this one report.

You can get a lot of information to schedule meetings to make, to fill your needs.

So let's close this report now and return to the report's.

To share a tip, I want to share a tip with you guys now.

So we want to go back to the click the refresh.

Great. And now click the reset buttons.

If you want to obtain a list of all host agencies you ever used, past and present.

Do not set any of the display filters.

Those are only for active agencies and will not include older and active organizations.

Do not enter any date ranges and then click all three of the show filters the summary,

the organization summary, and the most recent assignment only.

And then you would click search, the result would be the participant summary worksheet containing a list of all of your host agencies.

And active and inactive ones.

With their contact information.

Let's see. Can you scroll up, Chanel?

OK.

Great. We're not going to open this report simply because it looks like the same report we just saw, but just know it'll contain all of the host agencies that go back to the time the data collection first started the.

Computer data collection first started and we learned this tip during our V Live office hours, so it's a good tip to have.

Now let's click back to reports.

Let's see.

Just go back up to the top and we can get there you go.

Click back to reports.

And now we're going to begin looking at the equitable distribution reports.

OK.

Equitable distribution, or ED reports, provide information about authorized positions and modified positions.

There are three links on the ED page, the home link, which is what we're currently in, provides general overview of the equitable distribution information.

The reports link is where you can view the authorized and modified physicians broken down by either state or by grantee.

And then there are definitions which contains a glossary of acronyms and their explanations to help you understand the table and their contents.

The bottom of the homepage has three informational boxes.

These boxes can be opened and closed by clicking on them.

They are tables by state and if you click on that there's the big explanation about how to use and understand the tables by state.

Then there's tables by grantee and again, a lot of good information about using and interpreting the data, and the last is download all state's data.

And again, an explanation of that.

The instruction tables provide complete information for accessing and interpreting, Interpreting the data, which is particularly helpful for anyone needing assistance in reading or using the ED tables, or just a refresher.

So now let's click on the reports link, which is really the heart of the ED reports.

Again, we have a yellow notes box at the top.

That provides helpful information.

The notes advise that enrollments are refreshed daily until the end of the quarter and are frozen 30 days after the quarter end.

There is also a note for when there are more than one national grantees operating in the same county.

So it's a good idea to always check out the note boxes as they do provide very helpful information.

OK, we can close that note.

In general, the ED reports display data about the authorized positions or AP or the and the modified positions or MP that are allocated to each county served by each grantee. By using the links, you can view this information and we'll just hover over the links.

We're not going.

To open them yet authorized position by state. Then we have authorized position by grantee.

Then there's modified positions by state, then modified positions by grantee and then download authorized positions, which is all the download and the download modified position.

These reports also show you the number of participants enrolled in each quarter.

The difference or variance between the number of authorized or modified positions and the actual number of participants enrolled.

Download authorized and download modified positions. Provide an Excel download containing the full listing of all of the grantees by county or region, depending on the state.

To view the reports, begin by clicking the report name, which will display the filters.

So let's start with the authorized positions by state.

And you'll notice the filters include the program year, the quarter and the state.

Because we have asked for this information to be provided by state.

However, click if you want to just click on the authorize positions by grantee.

This is just for comparison.

And you'll see the filters are now program year, quarter and grantee because we're now asking for the information by grantee.

Lastly, click on the download authorized positions and there are only two filters.

And that is program year and quarter because all we're looking at is the program year and quarter, the whole listing of all of the positions either authorized or modified by grantee by county.

So let's go back and click on authorized positions by state.

OK, all of the report tables use the same format and the same process for accessing the information.

So we're going to be looking at the authorized positions by state and we're going to select PY 23.

And quarter 2.

And let's use the state of Texas.

And then click search.

Now you see the report tables and you see that there is a green X above each of the tables which is the download icon to open the report in Excel.

The first table displays the state summary.

You can see the state information which shows all the positions for the state grantee and the total and the total pop. The total positions for the national grantees operating in that state.

The table also identifies the number of counties that are over or under enrolled.

The percentage and the variance.

The second table displays details of the state.

So let's Scroll down.

OK, great.

We see that there are three counties in this state and the number of the state grantee authorized positions are denoted by SCSEP state grantee authorized positions and we have the enrolled positions.

We have the authorized positions, the enrolled positions.

We have the variance.

And then following that is that information is followed by all of the national grantees that may be operating in that state.

For each grantee, it shows on their it shows the number of positions, the number enrolled, and it shows that variance and then the last row contains the totals for the state.

To export any of the ED reports, simply click on the green export icon and then open the report from the downloads window. Let's click OK.

Let's click the AP by state and open the file.

So.

Yeah.

And when that spreadsheet opens.

We'll see that it reflects the same information contained in the summary we just reviewed.

There we go.

And you can see it shows the three counties. If you want to open up column B up to thank you for doing that.

Open up column B OK, you can see there are the three states.

We have the state grantee authorized positions. The state grantee enrollments, and then the state grantee variance which is followed by the national grantee information in that same state and in those same counties.

OK.

So let's close this report and return to the reports.

You want to scroll up again.

There we go.

OK.

Let's see this time.

Let's click on modified positions by grantee.

So we'll do a modified this time and by grantee and we're going to select PY 23.

And quarter two and our friends at the older Worker Association.

And click search.

OK, here we see that the older workers association in the summary section on the top. Is operating in three states, California, Nevada and Oregon, and it shows the same information as we saw for the state.

We have the except this time for the modified positions we've got the number of modified positions, the number enrolled and then the variance.

And then going across the page it shows the number of counties and the number of over of under enrollments and the percentages of under enrollments, and then the average and then it does the same thing for the over enrollments and then it does the same thing for over under, which is an average of the two and as we scroll down to the modified positions by grant details we'll see the details for each of the states.

And they each listed separately and they display the counties in which the grantee operates in each of those states, and provides not only does it provide the modified enrolled and variance information for the organization, it has it by quarter.

So this way you can check to see progress and getting those positions filled across a period of time.

OK.

So let's quickly look at the download report.

So let's click on this download.

Great.

And we'll see once that opens.

He'll just provide the information.

Sometimes it's much easier to follow in a spreadsheet than it is viewing it on a screen.

There we go.

OK.

So we see the modified positions and as we scroll down, we see the first quarter and

the three states keep scrolling down to see the second quarter and the three states and then the third quarter followed by the fourth quarter.

And that is how the information is displayed in excel. Let's close this report.

And scroll back up to the top.

And let's look at authorized positions.

Let's see.

Let's download authorized positions and take a look at that.

We'll select program year 22.

And quarter four, we can leave quarter 4.

Notice that there is no search button for this download.

There is only the download icon, so just click on that download export icon to open the document in Excel or open the report in Excel.

OK, if you want to open the headings.

There we go.

And if you could open column B.

Super great.

So now this is. Don't forget we're in the training site, so it's not what you would see if you were in the in production to see the full details included in the ED reports.

So this is just displaying for this particular data set we have a half a dozen counties that are served across.

Four states, and it's showing that as we move across.

As we move across to, OK.

It shows the state AP.

It shows the state enrolled, the state variance and then it shows for each of the nationals the same information.

It shows the authorized positions, the enrollments and the variance for both of those two grantees that are operating in those states and counties as well.

So this ends the review of the reports available from the navigation bar.

So let's close out this report.

And let's go now to the admin console.

And scroll down and the reports that we're going to be talking about today are the extracts they generate internal QPR, the view frozen, QPR and the nationwide QPR.

We'll begin by clicking the extracts card on the admin console.

Extracts are available to all users, and they're often referred to as data dumps because the data is extracted for specific purposes without filters or time frames.

Some grantees use this information for transfer into their own internal data systems.

Enter the grantee. Our pals at older workers association. Yeah.

And there's alliance for employment.

Both fields are required.

And we'll see that the extract types has opened and now we can just see that there are three types of extracts participant, waiver and break.

Let's select the participant, extract and click export.

And a pop up box will ask if you're sure you want to leave this page.

We say ok and we click the refresh until the extract name appears.

And then we click on the file name.

To open the download.

OK.

Give me a second to open all that up, super.

The participant extract contains all of the data entered for all of the participants that was gathered during intake. As we slowly scroll through, you will see the participants ID and their case ID. You'll see their address and contact information.

You'll see their characteristics if the participant has ever been transferred from another grantee that's listed along with their transfer.

You'll see the initial eligibility determination date and whether they were ever on a waiting list. The dates of the initial PRAs are listed. The job interest codes are listed and eligibility recertification dates are listed.

There's a lot of information and as you can imagine if these extracts do provide information for everyone in the data system, going back to when the data was begun to be collected.

So you can have thousands and thousands of records in these extracts.

It's a lot of information and again, a lot of grantees use this to populate their own internal systems.

So let's close this extract and return to the download page.

And we can click the close to return to the extracts.

OK.

Let's enter our pals again at older worker association and the lines for employment.

Now let's select the waiver factors.

Extract the waiver.

Extract and click the export.

And we follow that same format, clicking OK, clicking refresh, clicking the name.

And then opening up that download.

The waiver factors extract lists all participants and the waiver factor updates for each program year.

The data was entered so it's scroll through.

We see.

We have the identification information.

The participant name and application date the program year in which the data was updated and this the 1st row just happens to be 2023.

Then it goes through all of the waiver factors, severe disability and is no and the date it was entered frail is no and the date it was entered not receiving Social Security and the date it was entered severely limited employment prospects. Limited English. You get the idea.

It shows all the waiver factors and the dates.

So again, this is an extract, it's a data dump.

It is available for all the participants that have been entered into your program.

So let's close this extract.

And then go back down to go and close the download page to return to the extract page.

Now let's enter our pals. And let's select the last extract which is break.

And then click export following the same process.

Clicking the name.

Clicking the file to open it.

The less data you have, the faster the extracts open.

So just remember you might have a lot of data, so it might take the extracts a little while to open.

The extract lists all the participants who were ever on break. As we slowly scroll through, you'll see each break has a unique ID number along with the case ID, the participant ID it shows.

The assignments start and end dates. It shows the break, start and end dates and the reason for the break.

This report also contains the comments that may have been entered for each break, and whether documentation for that break was provided, so a lot of good information here.

Again, this is for everybody that's ever been in your program, ok.

Let's close this extract and then close the download page as well.

To return to the extract page ok, that completes the extract review and let's return to the admin console.

OK.

The WIPs QPR generate.

WIPs QPR and generate WIPs QPR addendum can only be generated by grantee administrators when they need to upload their QPRs into WIPs.

So as mentioned earlier, WIPs training was conducted for grantee administrators earlier, earlier this year, and the recording is available on workforce GPS and the older worker community of practice.

So let's now move to generate internal QPR.

Great. So, the internal QPRs are available for all users. They can be generated anytime during the quarter to determine how well the program is meeting its goals.

So let's click on it.

We're going to enter.

Let's look at the yellow instruction box first.

Let's see what happens there.

It advises us to select quarter and grantee to generate the QPR. OK, you'll notice all fields except the state field are required, so let's enter PY 24.

And for the quarter, let's select the whole program year 7124 through.

There you go. The grantee is older worker association and the sub is alliance for employment.

The grantee administrator can generate a QPR for the entire grant and so they don't have to select A sub grantee, but for our purposes here we're going to select we selected a sub grantee and we're going to click export.

The internal QPR report generation status page advises the report is being generated and when it's complete you'll receive an e-mail with the download link.

This process was implemented because the report generation can take a significant amount of time, as many of us have experienced in the past, by sending an e-mail when the report is ready, you're able to conduct other business until the report has been generated.

So click confirm to generate the report.

OK. And once the e-mail is received, you'll be able to access the QPR.

And we have one that's already opened because it would take a long time to wait for it and get the e-mail.

So you'll note that.

Just a note that to receive the link and open the QPR link that is provided you have to already be logged into GPMS.

So if you happen to log out before you get the link to open the QPR, just make sure before opening the link you log into GPMS because otherwise you're going to have to do that anyway because it's giving you a link into the system.

OK, the QPR has several sections starting with the grant overview which contains the grantee and sub grantee information.

It has the number of authorized and modified positions for the selected program year. It also shows the grantees average project duration for the quarter and for the last nine quarters.

Then we have 3 sections. Section A of the report contains the demographics of the participant and the report period.

So we'll just Scroll down those.

Section B contains the core for performance measures, and we'll just look at the columns.

Column D shows the measure's goal.

Column E shows performance for the current quarter.

Column F shows year to date performance and column G shows the performance for the last four quarters and if we want to Scroll down to column C.

Column C contains the participant level information for the quarter and year to date. It shows the number enrolled, including those carried over from the prior program year.

It shows the number of exits and the number for each exit reason.

It shows the number of training hours that were entered, the number of participants in placement activity and community service data, including the number of participants, the number of hours and the average community service hours per week.

OK.

So that's what the QPR looks like.

So let's close this report and return to the Admin Council.

OK. Next we're going to look at the frozen QPR, which is also available to all users.

And these quarterly reports show data and performance calculations that are frozen and will no longer be calculated, and that's why they're called frozen QPRs.

This data freeze typically occurs during the month following the end of the quarter, and we know that grantees are provided advance notice of the freeze dates to ensure they have an opportunity to enter all outstanding information.

So we begin by selecting the program year and we're going to select 2023.

And we click on quarter and it will display the frozen QPRs available to be viewed in this case that one was available.

And we're going to select our friends in the grantee field, older worker and our sub grantee.

The sub grantee isn't required, but we're just going to select it here and then we're going to click view report.

And then here we have just a download icon to click to open.

And we're going to open that.

OK.

As we saw with the internal QPR, the frozen QPR also has the same categories or sections.

It has the grant overview. It contains section A with the participant summary.

It has Section B with the C Sep core measures.

And section C with participant level information.

So let's close this report.

And also on the confirmation page, click close.

OK.

Let's Scroll down now.

Two nationwide QPR.

And the nationwide QPR is also available to all users and is generated after the quarters report has been frozen.

So for demonstration, we're going to select PY 23.

And then the quarter that is available?

Oh, lots of quarters.

Let's pick the full year 7123 to six 3024 super and click export.

And confirmed the same situation. The same will happen where you will get an e-mail when that report is ready to see.

But we've downloaded one previously.

Just to give you an idea, so the nation report nationwide report contains aggregated data for all grantees, state and national, to determine the overall effectiveness of the C-Suite.

So just Scroll down.

We'll see.

We have the grant overview and then the other three sections.

A with the participants summary B with the core measures.

And C with the participant level information.

OK, great.

So this concludes today's session on reports.

Users should now have a better understanding of the reports that are available and how they can be used to effectively manage required case management activities and also to do some monitoring of the program's success.

And meeting goals and we're going to move.

Now I'll turn it back over to Michi for the question and answer and Chanel, if you leave the system up just in case we need to demonstrate something.

So, Michi, back to you.

**McNeace, Meche - ETA CTR 1:17:49**

Great training, Joyce.

It was a lot of information, good information.

**Barcley, Joyce M - ETA CTR 1:17:54**

Thanks.

**McNeace, Meche - ETA CTR 1:17:56**

We have one question that's been sitting in the chat waiting for you to conclude, and this is one that Steve wrote and he's making a statement.

But maybe you can help him out.

So he said.

**Barcley, Joyce M - ETA CTR 1:18:07**

OK.

**McNeace, Meche - ETA CTR 1:18:08**

When I run the participant hour reports and run year to date only, I get a total of 300 plus enrollment.

But when I add in the 0 hours to the year to date, it's only show 65.

**Barcley, Joyce M - ETA CTR 1:18:27**

That's a good thing, Steve, because 65 of those 300 plus only need to have hours entered.

**McNeace, Meche - ETA CTR 1:18:29**

Mm hmm.

**Barcley, Joyce M - ETA CTR 1:18:34**

They have zero hours, so if you want to go back to the reports tab. Yeah. And let's go into our older workers friends and the alliance.

And click search.

Let's go to the participant hours report, OK and just pick program year 24.

So OK, he said that the 1st, when he clicks year to date. OK.

So let's click year to date.

**McNeace, Meche - ETA CTR 1:19:06**

Mm hmm.

**Barcley, Joyce M - ETA CTR 1:19:08**

And let's click search.

We have 11 for this particular grantee.

Now let's click only zero hours, so it's going to be year to date.

**McNeace, Meche - ETA CTR 1:19:19**

OK.

**Barcley, Joyce M - ETA CTR 1:19:27**

I'll program your 24. OK year to date and 0 hours.

And search and we have zero because all the hours have been entered because we're only we're requesting now to see only the number of participants that were active during that program.

You're active or exited in the program year that have zero hours entered.

So good job.

All the hours were entered, so you really hope that you see a number.

When you're clicking only zero hours, that's going to be smaller than the number that you started with, like if you're using the program year to date, or if you're using a quarter, adding in the only zero hours hopefully is less because hours should have been entered or may need to be entered, so if it's like just the end of the quarter, then everything may be zero hours because no data was entered yet.

**McNeace, Meche - ETA CTR 1:20:26**

OK, awesome sauce.

So, alright, so Joyce, you're getting a lot of kudos accolades there saying thank you.

**Barcley, Joyce M - ETA CTR 1:20:32**

Thanks.

**McNeace, Meche - ETA CTR 1:20:33**

Very informative, excellent training.

Thank you for the presentation.

Good information. So, and here's one it says in past sessions.

Have you gone over how to utilize the participant wait list in GPMS?

**Barcley, Joyce M - ETA CTR 1:20:50**

Sorry, the participant. What?

**McNeace, Meche - ETA CTR 1:20:50**

And Wait list in GPMS.

So yes, we did.

That was basically presented during the case management or the case management session on intake through assignment.

So, Yvonne, if you want us to quickly show you, are you asking how to put a participant on a wait list?

If that's the case, we can show you real quickly.

Just she's like, yes, cause you show her if you have a participant that you could put on the wait list.

**Barcley, Joyce M - ETA CTR 1:21:26**

OK, sure.

Yeah, just go into cases and then show filters and reset show filters and then reset.

OK.

Now we're going to select go scroll up please.

Yeah, that way.

Pick the status, select the status of.

**McNeace, Meche - ETA CTR 1:21:53**

Tending or eligible, but no assignment.

**Barcley, Joyce M - ETA CTR 1:21:54**

Penned.

Eligible, yes.

Eligible would be a good one, OK.

And then click search.

And just pick the just a second. If you pick the second one, Joan.

Yep. I'm going to open her up.

OK, so to place her on the wait list.

So this participant has been deemed eligible.

Her characteristics.

Other enrollment information and program introduction have not been entered. As you can see by the intake checklist.

So they haven't been entered, but we're going to put her on the wait list because an assignment isn't available for her yet.

So click on related actions.

And click on add to wait list.

And it asks, Are you sure you want to add the person to the wait list? Click yes.

Now go back to her summary page.

And her status bar shows she's on the wait list.

Is that easy?

**McNeace, Meche - ETA CTR 1:23:07**

And there you go.

All right.

Let's see.

There's another question that says. Hope this is not off topic.

Will the newly created sector demonstration data fields be included in the data set used for participant dump and export files?

So I think they're asking if that those participants that are in the sector base will that you know their specific data be in the extract report.

And it is off topic and I don't.

I'm not really sure, but I do recall if I remember, didn't Alli said they were working on that.

**Barcley, Joyce M - ETA CTR 1:23:53**

I heard that they were working.

I don't know any of the details though.

**McNeace, Meche - ETA CTR 1:23:55**

Yes. Yep.

So Deborah, we don't have a definitive answer for you for that one, but I'm kind of thinking during the demonstration sector-based training, what we'll do is we'll go back and check and see.

And you're very welcome, Yvonne said.

Thank you, Joyce.

**Barcley, Joyce M - ETA CTR 1:24:19**

You're welcome.

**McNeace, Meche - ETA CTR 1:24:23**

OK.

So all GPMS.

Here's a question.

Where can I access the video?

All GPMS training will be available on workforce GPS, the community, the older workers community of practice, so this specific one will be available.

Let's say hopefully by the end of this week.

Early next week, but the other?

Recordings. The other training are currently available and we'll put that link in the chat.

And Kevin?

Has put that link in the chat. Thank you, Kevin.

Right.

There any other questions?

No other questions thus far. Joyce, that was it.

**Barcley, Joyce M - ETA CTR 1:25:14**

That's great.

**McNeace, Meche - ETA CTR 1:25:15**

You did such a good job that they were able to just follow it, and they can walk away doing all of everything that you demonstrate it.

**Barcley, Joyce M - ETA CTR 1:25:16**

Look.

And just look at the time. Perfect.

**McNeace, Meche - ETA CTR 1:25:25**

Perfect timing.

So I don't see any other questions in the chat.

Alright, you're right, it's 329.

I want to say thank you, Joyce.

Thank you, Chanel. Great training.

And this actually this training concludes the entire GPMS training series.

So we will re implement.

I know that throughout the month of May there were no GPMS virtual office hours, but we will put that back on the schedule.

And get going with that and we want to say thank you all for joining us today and taking time away from your schedule. And if you have questions after our training concludes, feel free to e-mail those questions to [SCSEPtechnicalassistance@dol.gov](mailto:SCSEPtechnicalassistance@dol.gov)

And that should conclude it.

Anything else you need to say, Joyce?

**Barcley, Joyce M - ETA CTR 1:26:29**

Thank you all for participating. And thanks Chanel for driving.

**McNeace, Meche - ETA CTR 1:26:31**

OK.

All right.

Well, thank you everyone.

We'll see you on V live.

Have a great rest of the afternoon.

Oh, you have one hand up, Joyce.

Rita you want to unmute yourself.

Nope. OK.

It was an accident.

**Mauro, Kevin M - ETA CTR** stopped transcription