Contents

ASSET System Reports Enhancements– Will be deployed on June 06, 2024

Introduction

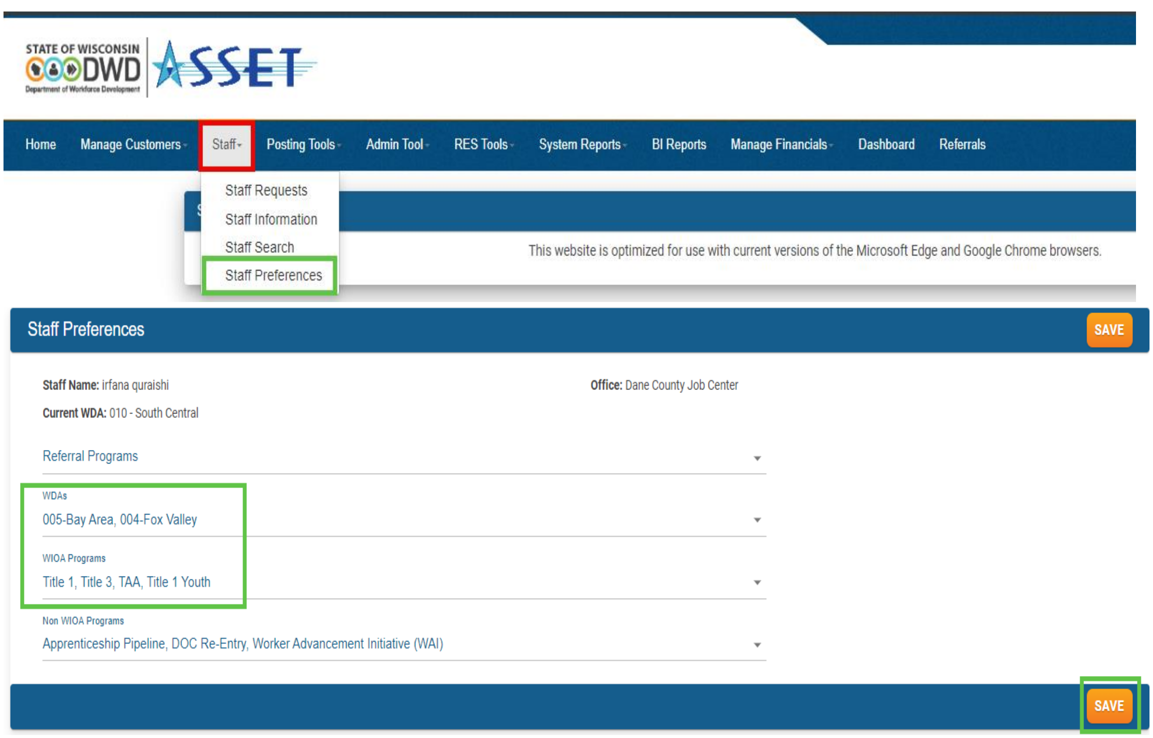
This project increased functionality within the ASSET system reports in the areas of consistency, user experience, and data accessibility.

Configuring Staff Preferences for Optimized Report Usage

This bulletin outlines how to configure staff preferences to ensure system reports display relevant data tailored to your work responsibilities.

Instructions:

1. Access the Staff Preferences menu: Navigate to the blue menu and select "Staff." Click on "Staff Preference Option."
2. Select Workforce Development Areas (WDAs): In the WDAs section, check the boxes corresponding to all WDAs where you provide services.
3. Select WIOA Programs: Under WIOA Programs, check the boxes of all the programs you work with.
4. Save your settings: Click the "Save" button. A confirmation message should appear: "Staff preferences saved successfully!"



Case Assignment

Streamlined Case Assignment for Career Planners

To simplify your caseload management, case assignments now default to "None." This allows you to focus on existing tasks without interruption.

Temporary Assignments: These assignments automatically expire within 3 days.

Permanent Assignments: These assignments remain active until you leave the case team.

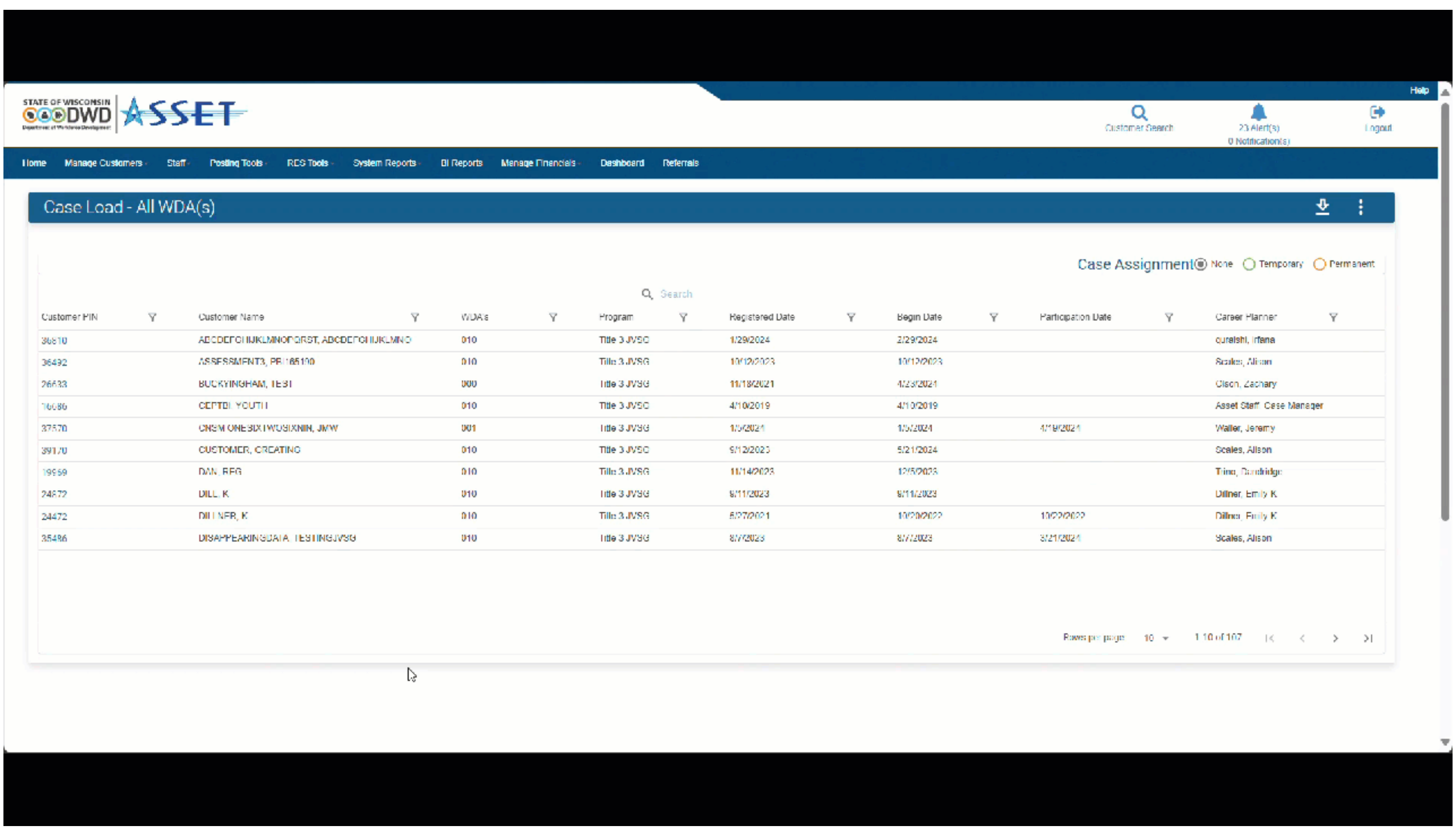
How To Take a Case Assignment

1. **Select Assignment Type**: Choose the type of case assignment you'd like to take. (Temporary or Permanent)

2. **Choose Assignment Purpose:** Once a type is selected, a dropdown menu with assignment purposes will appear. "Career Planning" is pre-selected by default. You can adjust this based on the specific situation.

3. **Hover for Acknowledgement (Handshake Icon):** Simply hover over the handshake icon to learn more about the acknowledgement process.

4. **Assigning Cases**: Click on any pin representing a customer whose case you'd like to take ownership of. This streamlined approach allows you to efficiently manage your caseload without disrupting your workflow.



Appendix: Directions on using the new ASSET grid/table

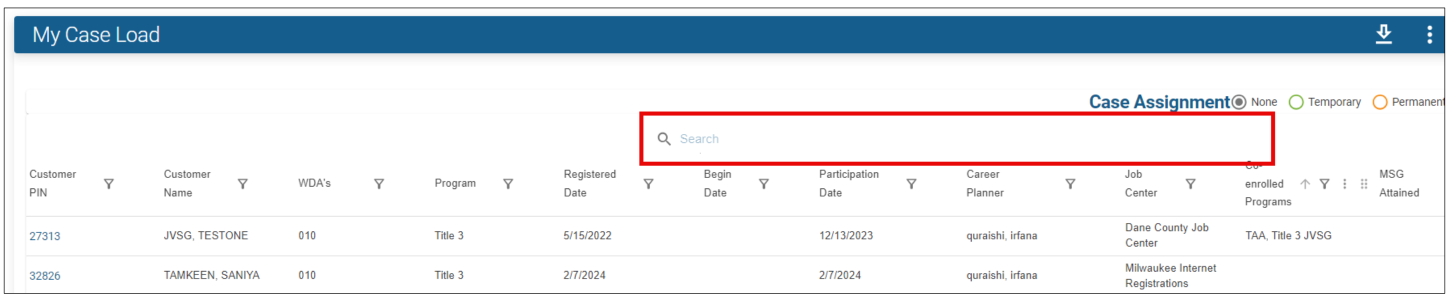
A new grid/table was created in the ASSET 2023-2024 projects to set a standard control that can be reused throughout ASSET. Data elements will differ from grid-to-grid/table-to-table but the functionality will remain consistent among the grids/tables.

The benefits of using reusable, standard controls are:
- Developers are able to deliver solutions quicker as many details around creating the controls will already be resolved/determined.
- Users will already be familiar with the functionality which will allow users to focus on the content.

The new search results grids will be added to other ASSET pages as they get re-developed over time. The following are directions on how to use this new technology. These directions can be used for any page on which this technology is used.

Searching – **to look for certain keywords, numbers or dates within a group of records**

- The system utilizes a universal search bar at the top of the page to enable users to search across the entire dataset.
- To search, type your keywords/numbers into the "search" field in the upper right hand corner of the grid (highlighted in red below). The results that you see below the search field will update with each keypress, so you do not need to hit "enter" on your keyboard to execute the search. The search field will show you results that match your search across every column in the grid.



Example:

If a user types in “A,” the search result will return all records that contain with the letter “A.” Similarly, searching for “TAA” will display all records containing “TAA” anywhere within the text.

If the user searches for the number "3", the system will likely search for the digit "3" within the text data of each row. Rows containing "3" would be displayed, while rows without "3" would be hidden from view.

Column Filters:

Column filters are a powerful tool to help you quickly find the specific information you need in large datasets.

How to Use Column Filters

1. Locate the Filter Icon: Find the small funnel icon in the column header of the column you want to filter.

2. Click the Icon: Clicking the funnel icon will open a menu with filtering options.

3. Select an Operator: Choose the operator that best suits your search:

Contains: Finds items where the column value includes the text you enter.

Does Not Contain: Finds items where the column value does not include the text you enter.

Starts With: Finds items where the column value begins with the text you enter.

Ends With: Finds items where the column value ends with the text you enter.

Equals: Finds items with a column value that exactly matches the text you enter.

Does Not Equal: Finds items with a column value that is different from the text you enter.

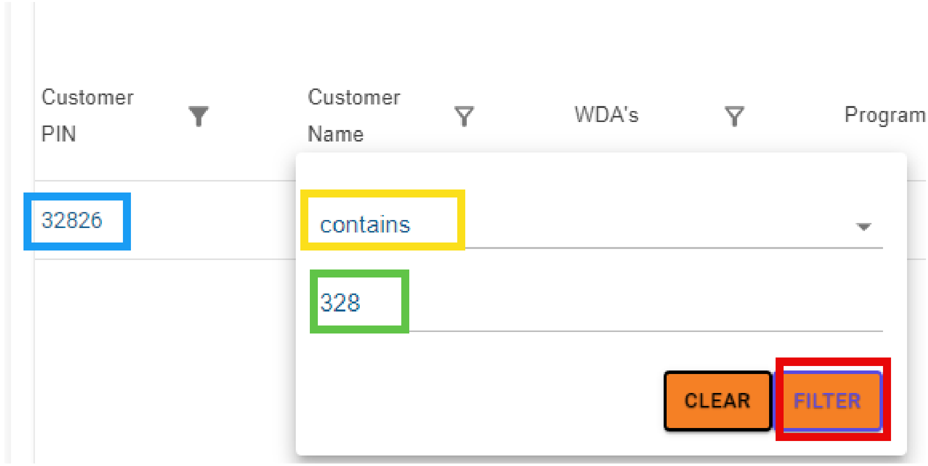
4. Enter Your Search Term: Type the text you want to filter into the text box.

5. Apply Filter: Click "OK" or "Apply" (button name may vary) to apply the filter.

Example

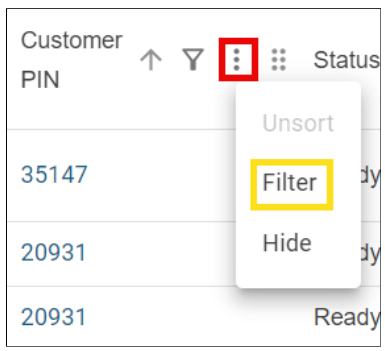
In the example below this shows how it looks to filter the Customer PIN column to values that equal number '123456.'

- The red box shows the funnel icon next to the column name, which opens this dialog box when selected.
- The yellow box shows what the user wants ASSET to do with the data it enters in the green box (ex: ignore everything with this value, show me everything greater than this value, etc.)
- The green box shows the PIN the user manually typed.
- Click on the filter icon (Highlighted in red box) again to make the dialog box disappear.
- The Numbers that are highlighted in Bule is the generated result.



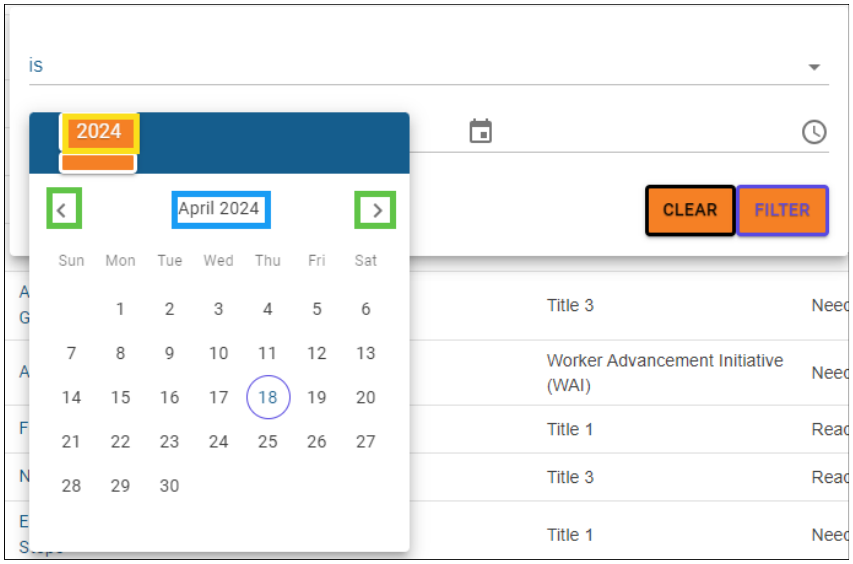
When you hover your mouse near the filter funnel icon, you'll see three vertical dots appear. This is the filter menu. Click the dots and select "Filter" to customize how you search within that column.

- The red box shows three vertical dots.
- The yellow box shows the word "Filter" that will bring up the dialog box.
- Click on the three vertical dots again to make the dialog box disappear.

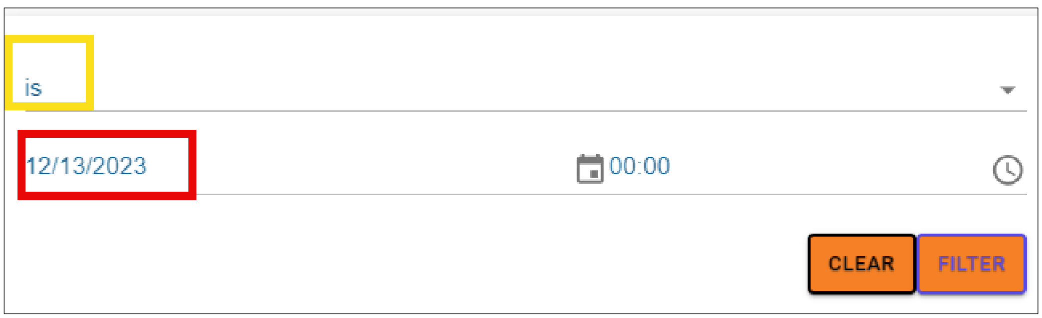


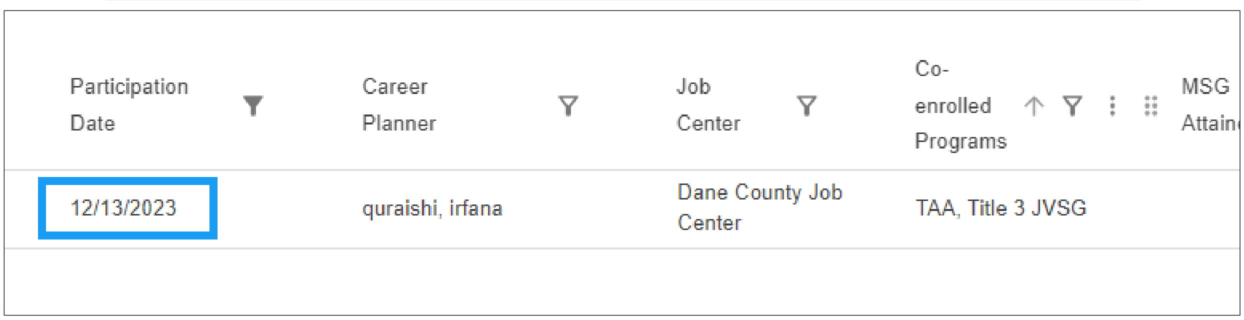
Filtering on dates

- Dates will use a calendar and clock control for users to select
- When filtering on dates, use left/right arrows in green to move between months. Click the current year highlighted in yellow to open a year selection list.
- See all 12 months; click your target month to view the specific calendar, highlighted in blue.



Example of filtering on dates



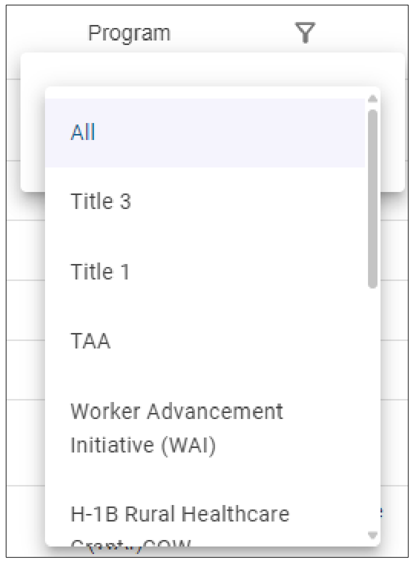


- Operator conditions for date filters:
  - **Is:** This option allows you to filter for events that contain specific date in that column. For example, you could filter for all events that contain the date "12/13/2023".
  - **Is not:** This option allows you to filter out events that contain specific date in the column. For example, you could filter out all events that contain the date "12/13/2023".
  - **Is after:** This option allows you to filter for events that occur after a specific date. For example, you could filter for all events that occur after January 1, 2024.
  - **Is on or after:** This option allows you to filter for events that occur on or after a specific date. For example, you could filter for all events that occur on or after January 1, 2024.

- **Is before:** This option allows you to filter for events that occur before a specific date. For example, you could filter for all events that occur before January 1, 2024.
- **Is on or before:** This option allows you to filter for events that occur on or before a specific date. For example, you could filter for all events that occur on or before January 1, 2024.
- **Is empty:** This option allows you to filter for events that have no date.
- **Is not empty:** This option allows you to filter for events that have a date.

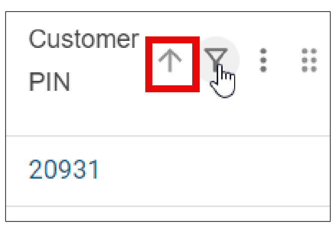
Filtering on selectable options

- Selectable option (like those found in dropdown boxes) will allow users to select from a specified list of options

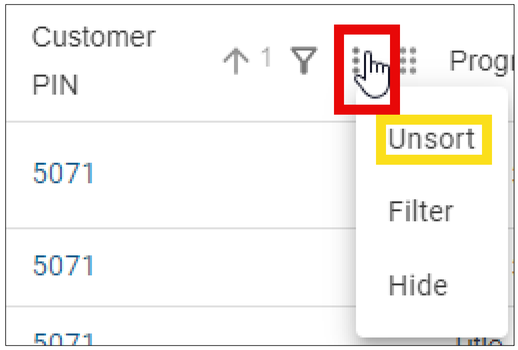


Sorting/Ordering – **to take the results you see and arrange them alphabetically or by size**

- When you hover your mouse on or near the filter icon next to a column name, the sort icon will automatically appear to the left of the filter icon.
  - The sort icon is in red below.

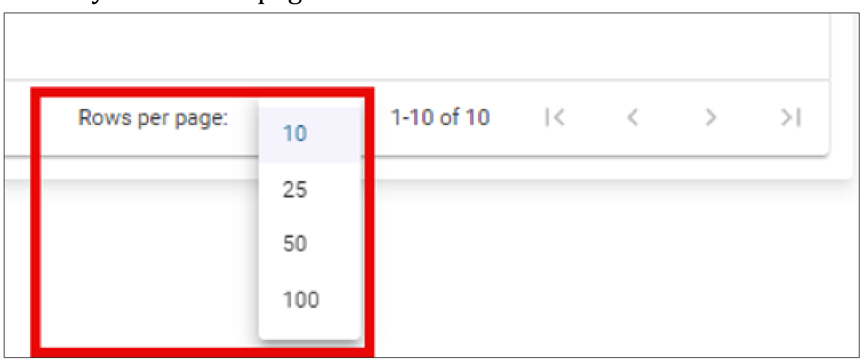


- On an initial sort, the column will be sorted "ascending" (low-to-high). On a second sort, the column will be sorted "descending" (high-to-low). A third sort on the same column will toggle the sort back to "ascending".
- Sorting a different column will remove the sort from the original/previous column
- To un-sort a column, hover your mouse on or near the filter icon and click on the vertical ellipses. This opens a dialog box. Select "Unsort" and your column will revert to its default sorting.
  - The red box shows the vertical ellipses icon.
  - The yellow box shows the "Unsort" action.
  - Click on the three vertical dots again to make the dialog box disappear.

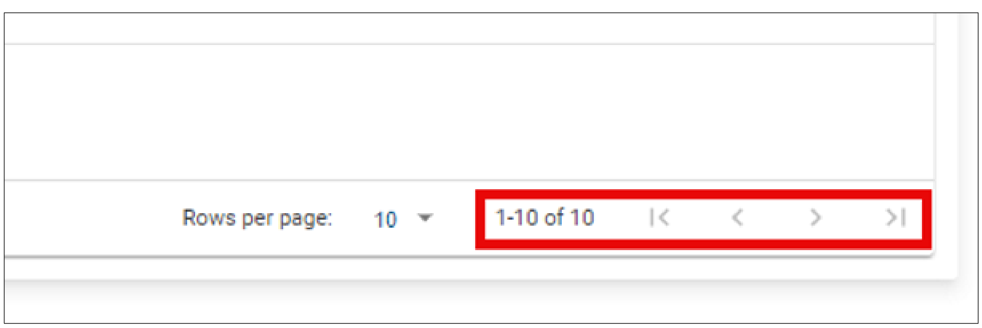


Pagination – to change how many rows appear on one page and move to a different page

- The bottom right-hand corner of the grid allows users to choose to see more rows on the page, move to the next page or jump to the first or last page.
- Seeing more rows on one page
  1. Click the dropdown menu.
  2. You'll see several options, such as 10, 25, 50, and 100.
  3. Choose the number of reports you'd like to see per page.
  4. The system will automatically adjust the displayed reports. For example, if you select 25, you'll see the first 25 reports on your current page.

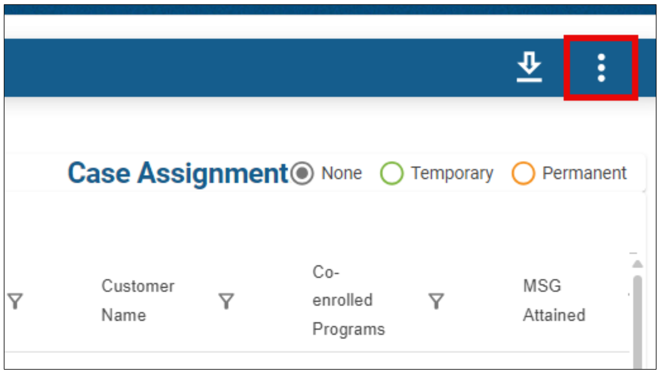


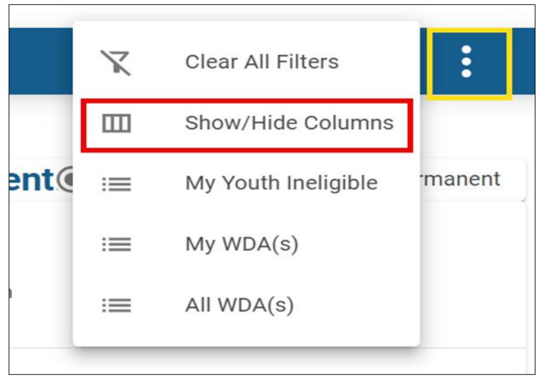
- This section allows you to navigate between different pages of reports, depending on the total number of reports available.



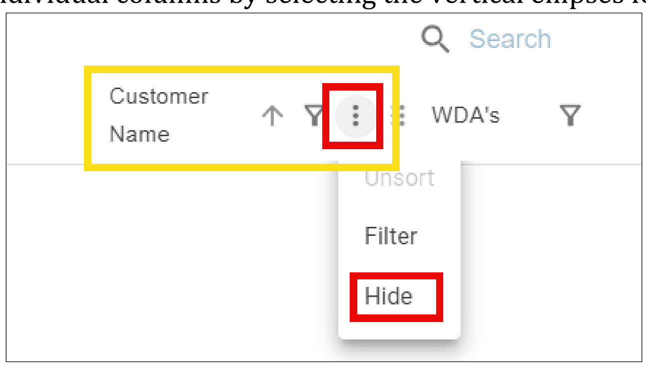
Showing and hiding columns – **to change the columns that you see**

- Selecting the vertical ellipses in the upper right hand corner of the grid will give users a menu with additional options.
    - The red box shows the vertical ellipses.
    - The yellow box shows how users may show or hide columns
    - The user can click the three vertical a second time to collapse these additional options.

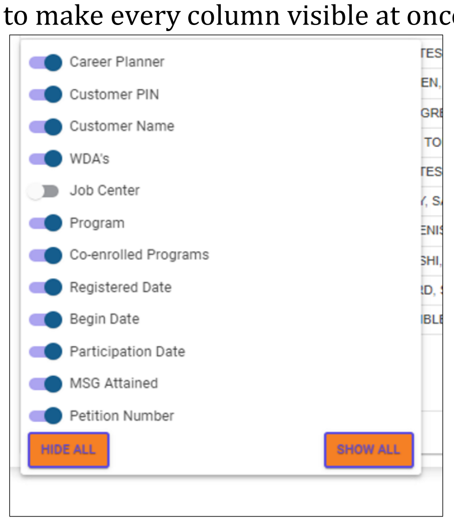




- Users may also hide individual columns by selecting the vertical ellipses for the specific column.



- If you select "Show/Hide Columns" you'll see a list of all the column names. Each name has a toggle switch next to it.
    - If the toggle is light purple, the column is currently visible.
    - If the toggle is grey, the column is hidden.
    - Click the toggle to show or hide individual columns.
    - Use the "Show All" button to make every column visible at once.

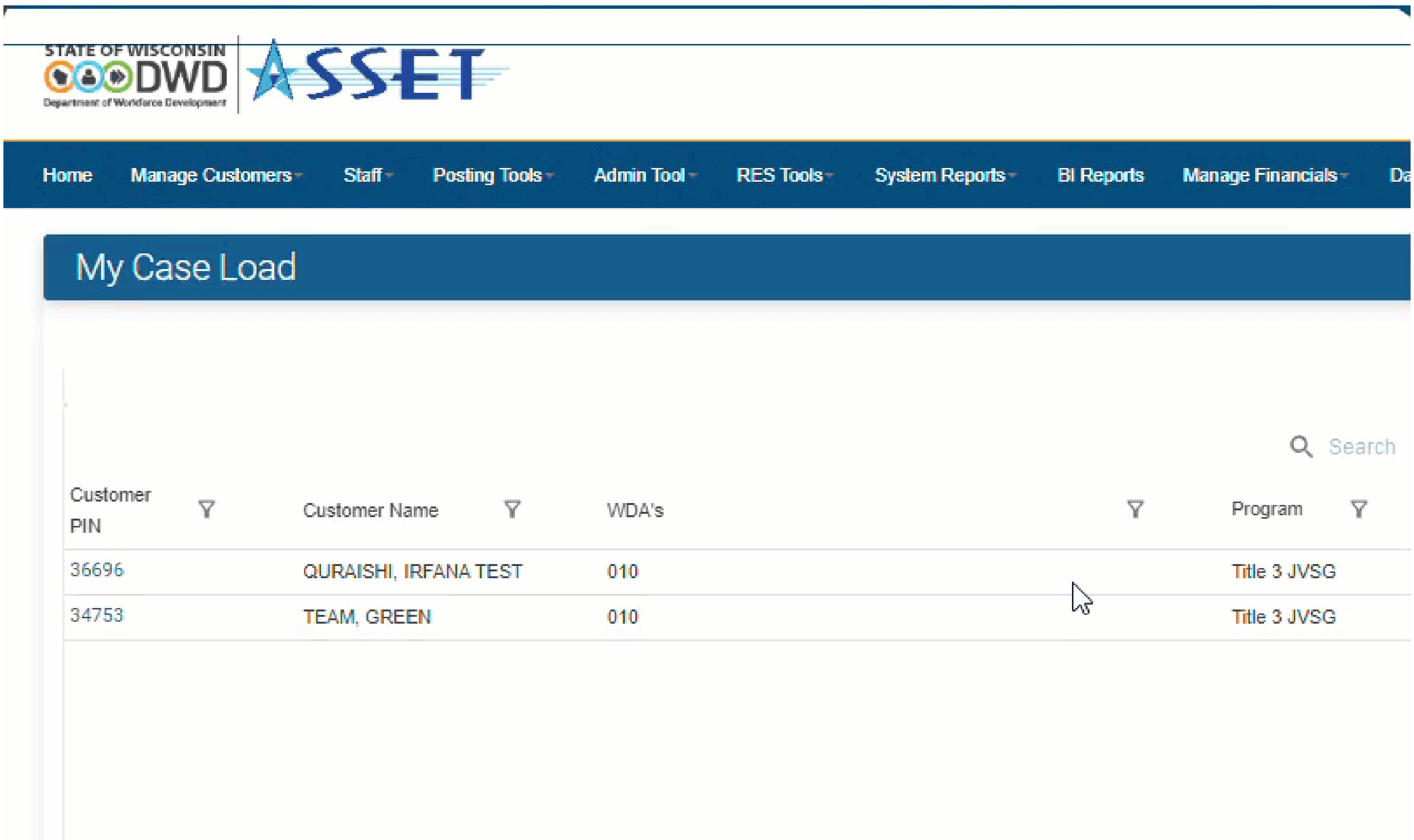


Resizing columns – **to make a column wider or narrower**

1. **Locate the Target Column**: Hover your mouse cursor next to the right edge of the column header you want to resize.
2. **Identify the Indicator:** Look for a vertical blue line to appear along the edge of the column header.
3. **Click and Drag:** Click and hold on the blue line. Drag your mouse left or right to adjust the column width as desired.

Example

- Hover your mouse over the right edge of the column header (e.g., "Customer Name"). Wait for a blue line to appear.
- Click and hold the blue line.
- Drag your mouse left (to make the column narrower) or right (to make the column wider).
- Release the mouse button when you're happy with the new column width.



Re-ordering columns – **to change the order of the columns from left to right**

Method 1: Drag and Drop

1. Hover: Place your mouse cursor over the header of the column you want to move.
2. Click and Hold: Click on the column header and hold the mouse button down.
3. Drag: Move the column left or right until you reach the desired position.
4. Release: Let go of the mouse button to place the column in its new location.

Method 2: Six Dots

1. Hover: Place your mouse cursor over the column header.
2. Locate the Dots: Look for the six dots that appear on the right side.
3. Click and Hold: Click on the six dots and hold the mouse button down.
4. Drag and Drop: Move the column to its new position and release the mouse button.

Important Note: When you reorder a column, it will automatically swap places with the column highlighted in green.

Example

How to Rearrange "Co-enrolled Program" Column:
Goal: Move the "Co-enrolled Program" column so it is directly beside the "Participation Date" column.

Step 1: Locate the "Co-enrolled Program" column header. Screenshot 1
Step 2: Click and hold on the column header or click on six dots.
Step 3: Drag the "Co-enrolled Program" column towards the "Participation Date" column.
Step 4: Watch for the "Customer Name" column to be highlighted in green. (This indicates the Co-enrolled Program column will swap its place with Customer Name Column). Screenshot 2
Step 5: Release the mouse button to drop the "Co-enrolled Program" column into its new position. Screenshot 3

Imagine your columns are arranged like this:

Customer Name | 2. Participation Date | 3. Registered Date | 4. Co-enrolled Program

When you drag the "Co-enrolled Program" column next to "Participation Date", the "Customer Name" column will highlight green. Dropping it here will result in:

Co-enrolled Program | 2. Participation Date | 3. Registration Date | 4. Customer Name

Screenshot 1:

Customer Name	Participation Date	Registered Date	Co-enrolled Programs	M A
JVSG, TESTONE	12/13/2023	5/15/2022	TAA, Title 3 JVSG	
TAMKEEN, SANIYA	2/7/2024	2/7/2024		
TEAM, GREEN	1/31/2024	12/19/2023	Title 1 Adult, Title 3 JVSG	
CRUIS, TOM	9/7/2023	1/1/2018	Title 1 Adult, Title 3	

Screenshot 2:

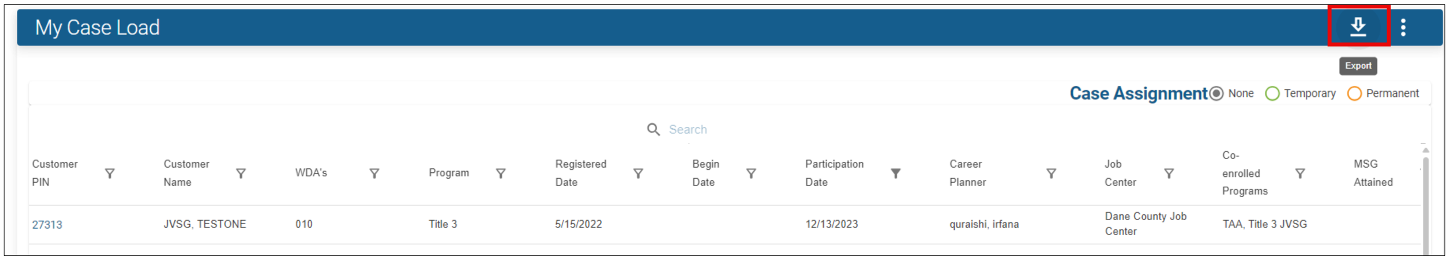
Co-enrolled Programs / Customer Name	Participation Date	Registered Date	Co-enrolled Programs
JVSG, TESTONE	12/13/2023	5/15/2022	TAA, Title 3 JVSG
TAMKEEN, SANIYA	2/7/2024	2/7/2024	
TEAM, GREEN	1/31/2024	12/19/2023	Title 1 Adult, Title 3 JVSG

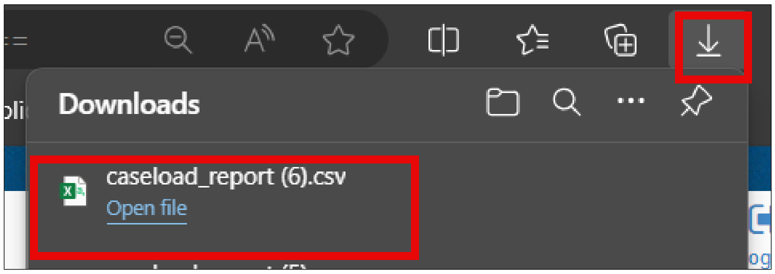
Screenshot 3:

Co-enrolled Programs	Participation Date	Registered Date	Customer Name
TAA, Title 3 JVSG	12/13/2023	5/15/2022	JVSG, TESTONE
	2/7/2024	2/7/2024	TAMKEEN, SANIYA
Title 1 Adult, Title 3 JVSG	1/31/2024	12/19/2023	TEAM, GREEN

Exporting – **to take the results you see on the screen and download them as a file**

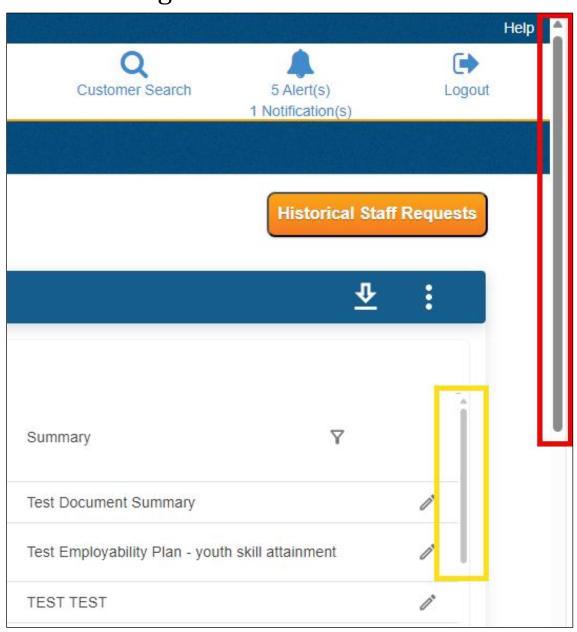
- Every new grid allows the user to download the results as an excel file.
- The results in your excel file will represent however you've searched, sorted or filtered the results in ASSET.
- After you have narrowed your results to the records you want, click this icon to export your results.





Scroll bars – to move up and down or right and left within the grids/tables

- As the new technology is implemented in ASSET, there will be a mix of old and new technology on the pages. One of the results of this is that there will often be two scroll bars on pages with these new grids. One scroll bar allows you to scroll within the page itself, while the other allows you to scroll within the grid. Once the new technology is implemented throughout the application, users will again have one consistent scroll bar.
- The red box shows the scroll bar on the page. Use this scroll bar to move to the top or bottom of the page. The yellow box shows the scroll bar within the grid. Use this scroll bar to see all the rows of data.



Case Load Report

Understanding the Default View

Title 3 JVSG Program: When this is the only program selected in your staff preferences, the report displays these columns by default:

- Customer PIN: Unique identifier for the customer (ASSET PIN).Customer Name
- WDA Office: WDA office number where the career planner is working.
- Program:
- Registered Date: Date the customer registered for a program.
- Begin Date: Date the customer's first service began.
- Participation Date: Actual service open date of first service was created.

Additional Columns with Program Selection

Selecting additional programs in your staff preferences (beyond Title 3 JVSG) will add the following columns to the report:

- Career Planner: Identify the career planner who created a program for a customer.
- Will Display the job center that is assigned to the customer based on the zip code.
- Co-Enrolled Programs: All programs the customer is currently enrolled in.
- Measurable Skill Gained (MSG): Indicates if the customer's record shows any Measurable Skill Gain.

Specific Program Considerations

TAA Program: Selecting this program will add an additional column:

- Petition Number: Petition number assigned to the customer (if applicable). Will Only be visible if the Career planner selects TAA as a Non WIOA program in Staff Preference Screen

You can generate three versions of the Case Load Report:

1. **My Case Load:** Filter the report to show Case load Report for logged in user's selected WDA and Program.
2. **My WDA(s) and Program(s):** Filters the report to show Case Load Report of all career planners who work in the same WDA and provide services for the same programs as the logged-in user
3. **All WDA(s) and Program(s):** Filters the report to show Case Load Report for all career planners in Wisconsin who provide services

Employment Plan Review

Report Columns

The report will display the following columns of information:

- **Career Planner:** Name of the staff member responsible for the case
- **Customer PIN:** Unique identifier for the customer
- **Customer Name:** Name of the customer associated with the ASSET PIN.
- **WDA's:** WDA office number where the career planner is working.

- **Program:** Programs opened for the customer by a career planner.
- **Service Name:** The specific program the client is enrolled in.
- **Review Type:** The type of review.
- **Review Due Date:** The date the review is due.

NOTE:

- **Calendar Filter:** The new report version replaces the drop-down menu for selecting the review due date with a dynamic calendar filter. This enables you to easily select specific dates or date ranges. For instructions on how to use this filter, please refer to the "Filtering on Dates".

Available Report Views

The Employment Plan Review Report offers three filtering options to tailor the information to your needs:

1. **My Employment Plan Review:** Filter the report to show Employment Plan Review Report for logged in user's selected WDA and Program.
2. **My WDA(s) and Program(s):** Filters the report to show Employment Plan Review Report of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.
3. **All WDA(s) and Program(s):** Filters the report to show Employment Plan Review Report for all career planners in Wisconsin who provide services.

Exit Warning

The Exit Warning Report contains the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided.
- **Program:** Name of the specific program the participant is enrolled in.
- **Date Exit Will Be Created:** Projected date the participant's exit will be initiated in the system.
- **Exit End Date:** Final date of the participant's eligibility for services.
- **Job Center:** Location of the job center the customer was associated with.

Available Report Views

The Exit Warning Report offers three filtering options to tailor the information to your needs:

4. **My Exit Warning:** Filter the report to show Exit Warning Report for logged in user's selected WDA and Program.
5. **My WDA(s) and Program(s):** Filters the report to show Exit Warning Report of all career planners who work in the same WDA and provide services for the same programs as the logged-in user
6. **All WDA(s) and Program(s):** Filters the report to show Exit Warning Report for all career planners in Wisconsin who provide services.

Exited/Follow-up Report

Default Timeline & Filtering

- **Default Follow-Up Timeline:** The report automatically displays follow-up needs for customers within 16 months of their exit date.

Exited/Follow-up Report contains the following columns

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided.
- **Program:** Name of the specific program the participant is enrolled in.
- **Date Exited:** Exit date of the program they are enrolled in.
- **Exit Created Date:** Date the exit record was created.
- **Exited Created By:** Who created the exit record.
- **Follow-ups For Exited Quarter Needed:** Indicates if follow-ups are needed for the quarter in which the customer exited.
- **Supplemental Data Needed:** Flags if UI Data Verified is NO for the displayed Quarter.
- **Job Center:** Location of the job center the customer was associated with.

Available Report Views

1. **My Exited/Follow-ups:** Filter the report to show Exited/Follow-ups Report for logged in user's selected WDA and Program.
2. **My WDA(s) and Program(s):** Filters the report to show Exited/Follow-ups Report of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.
3. **All WDA(s) and Program(s):** Filters the report to show Exited/Follow-ups for all career planners in Wisconsin who provide services

NOTE: The old dropdown filter has been replaced Exited Created Date column with a more flexible calendar filter for selecting specific date ranges.

Ineligible Youth Report

The "My Youth Ineligible Report" identifies individuals who are not eligible for Title I youth programs based on specific criteria. This report helps career planners and job centers:

Ineligible Youth Report contains the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided.
- **Date of First Youth Service:** If applicable, the date the customer first received services from a youth program.
- **Age at First Youth Service:** If applicable, the age of the individual when they first received services.

- **Job Center:** The name or location of the job center the individual is associated with.

Available Report Views

The Youth Ineligible Report offers three filtering options to tailor the information to your needs:

1. **My Youth ineligible Report**: Filter the report to show My Youth ineligible Report for logged in user's selected WDA and Program.

2. **My WDA(s) and Program(s):** Filters the report to show My Youth ineligible Report of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.

3. **All WDA(s) and Program(s**): Filters the report to show My Youth ineligible Report for all career planners in Wisconsin who provide services

New Registered Customer Report

This report provides valuable insights into individuals who have recently signed up for services within JCW. The report automatically displays data for customers who registered within the last 7 days.

The report includes the following columns:

- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided Age.
- **City:** Displays name of the City.
- **County:** Displays name of the County.
- **Military Service:** If the customer is an active military member.

Available Report Views

1. **Registration within 7 days:** displays data for customers who registered within the last 7 days.
2. **Registration within 30 days:** displays data for customers who registered within the last 30 days.

Open Services Report

The Open Service Report provides a comprehensive overview of customers who currently have active services.

The report includes the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided
- **Program:** Name of the specific program the participant is enrolled in.
- **Service Name:** The name of the service the customer is enrolled in

- **Actual Open Date of Service:** Date of Actual Open Date of Service

Available Report Views

Open Services Report offers three filtering options to tailor the information to your needs:

1. **My Open Service:** Filter the report to show My Open Service Report for logged in user's selected WDA and Program.

2. **My WDA(s) and Program(s):** Filters the report to show My Open Service of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.

3. **All WDA(s) and Program(s):** Filters the report to show My Open Service for all career planners in Wisconsin who provide services

RESEA Initial Session Availability Report

Understanding the Report Structure

- **Default View:** The report initially displays a summarized overview of session availability.
- **Detailed View:** Expand each section using the right-angled arrows to access a granular breakdown of available sessions.

Navigating the Report

1. **Total Session:** Click the arrow to reveal available sessions across all Workforce Development Areas (WDAs).
2. **WDA Details:** Click the arrow next to a specific WDA to view session details for the associated job centers.
3. **Session Timeframes:** Utilize the three vertical dots on the left side of the screen to filter available sessions for tomorrow, the next 30 days, 60 days, or 90 days.

The report includes the following columns:

- **Total Session:** The overall number of available sessions.
- **Total In-person Session:** The number of available in-person sessions.
- **Total In-person Session Available:** The remaining capacity for in-person sessions.
- **Total Virtual Session:** The number of available virtual sessions.
- **Total Virtual Session Available:** The remaining capacity for virtual sessions.
- **Session Required - Not Enrolled:** Individuals who require a session but are not yet enrolled.
- **Assessment Not Completed:** Individuals who have not completed the required assessment.

RESEA Subsequent Session Availability Report

Understanding the Report Structure

- **Default View:** The report initially displays a summarized overview of session availability.
- **Detailed View:** Expand each section using the right-angled arrows to access a granular breakdown of available sessions.

Navigating the Report

4. **Total Session:** Click the arrow to reveal available subsequent sessions across all Workforce Development Areas (WDAs).
5. **WDA Details:** Click the arrow next to a specific WDA to view session details for the associated job centers.
6. **Session Timeframes:** Utilize the three vertical dots on the left side of the screen to filter available subsequent sessions for tomorrow, the next 30 days, 60 days, or 90 days.

The report includes the following columns:

- **Total Session:** The overall number of available sessions.
- **Total In-person Session:** The number of available in-person sessions.
- **Total In-person Session Available:** The remaining capacity for in-person sessions.
- **Total Virtual Session:** The number of available virtual sessions.
- **Total Virtual Session Available:** The remaining capacity for virtual sessions.
- **Session Required - Not Enrolled:** Individuals who require a session but are not yet enrolled.
- **Assessment Not Completed:** Individuals who have not completed the required assessment.

TAA Training Benchmark Review Report

This report helps you monitor the progress of Trade Adjustment Assistance (TAA) participants in their training programs.

The report includes the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided
- **Service Name:** Name of the service they are enrolled in
- **Actual Open Date of Service:** Displays the date of when the actual service was opened
- **Planned End Date of Service:** Displays the date of when the planned service was closed
- **Petition Number for Service:** Petition number assigned to the customer
- **Training Benchmark Review Service Open Date:** Displays the Open date for Training Benchmark Review Service
- **Benchmark Completion Date:** Displays Benchmark completion date
- **Benchmark Due Date:** Displays Benchmark due date.

My TAA Waiver Deadline

The report includes the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided
- **Address:** Address of the customer
- **Petition Number:** Petition number assigned to the customer.
- **Application Date:** Displays application date.

- **Waiver Deadline:** Displays waiver deadline date.

Available Report Views

1. My TAA Waiver Deadline: Filter the report to show My TAA Waiver Deadline Report for logged in user's selected WDA and Program.

2. **My WDA(s) and Program(s):** Filters the report to show My TAA Waiver Deadline of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.

3. **All WDA(s) and Program(s):** Filters the report to show My TAA Waiver Deadline Review for all career planners in Wisconsin who provide services

My TAA Waiver Review

The report includes the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided.
- **Job Center:** The name or location of the job center the individual is associated with.
- **Service Name:** Name of the service they are enrolled in.
- **Petition Number:** Petition number assigned to the customer.
- **Actual Open Date of Service:** Displays the date of when the actual service was opened.
- **Planned End Date of Service:** Displays the date of when the planned service was closed.
- **Waiver Completion Date:** Displays the completion date of service.
- **Waiver Due Date:** Displays waiver due date.

Available Report Views

1. **My TAA Waiver Review**: Filter the report to show My TAA Waiver Deadline Report for logged in user's selected WDA and Program.
2. **My WDA(s) and Program(s):** Filters the report to show TAA Waiver Review of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.
3. **All WDA(s) and Program(s):** Filters the report to show My TAA Waiver Review for all career planners in Wisconsin who provide services

My TAA Work Authorization Expired

The report includes the following columns:

- **Career Planner:** Name of the staff member responsible for the participant.
- **Customer PIN:** Unique identifier for each participant.
- **Customer Name:** Full name of the participant.
- **WDA's:** Workforce Development Area(s) where services are provided.
- **Address of the Applicant:** Address of the customer.
- **Phone Number of the Applicant:** Displays phone number of the customer.

- **Petition Number:** Petition number assigned to the customer.
- **Work Authorization Expiration Date:** Displays the date of Work Authorization Expiration Date.
- **Days Remaining:** Displays number of days remaining for work authorization to be expired.

Available Report Views

1. **My TAA Work Authorization Expired:** Filter the report to show My TAA Work Authorization Expired Report for logged in user's selected WDA and Program.

2. **My WDA(s) and Program(s):** Filters the report to show My TAA Work Authorization Expired of all career planners who work in the same WDA and provide services for the same programs as the logged-in user.

3. **All WDA(s) and Program(s):** Filters the report to show My TAA Work Authorization Expired of for all career planners in Wisconsin who provide services