PY 22-23 End of Year Checklist

Presented by Elena Madrid, Supervisor, TWC AEL

Agenda for Today

- Go over the agenda.
- Learn how the check list is used, who would use it, and the benefits of using it
- Learn about any additions or changes to the check list from last year
- Who to contact for further assistance and clarification

Objectives

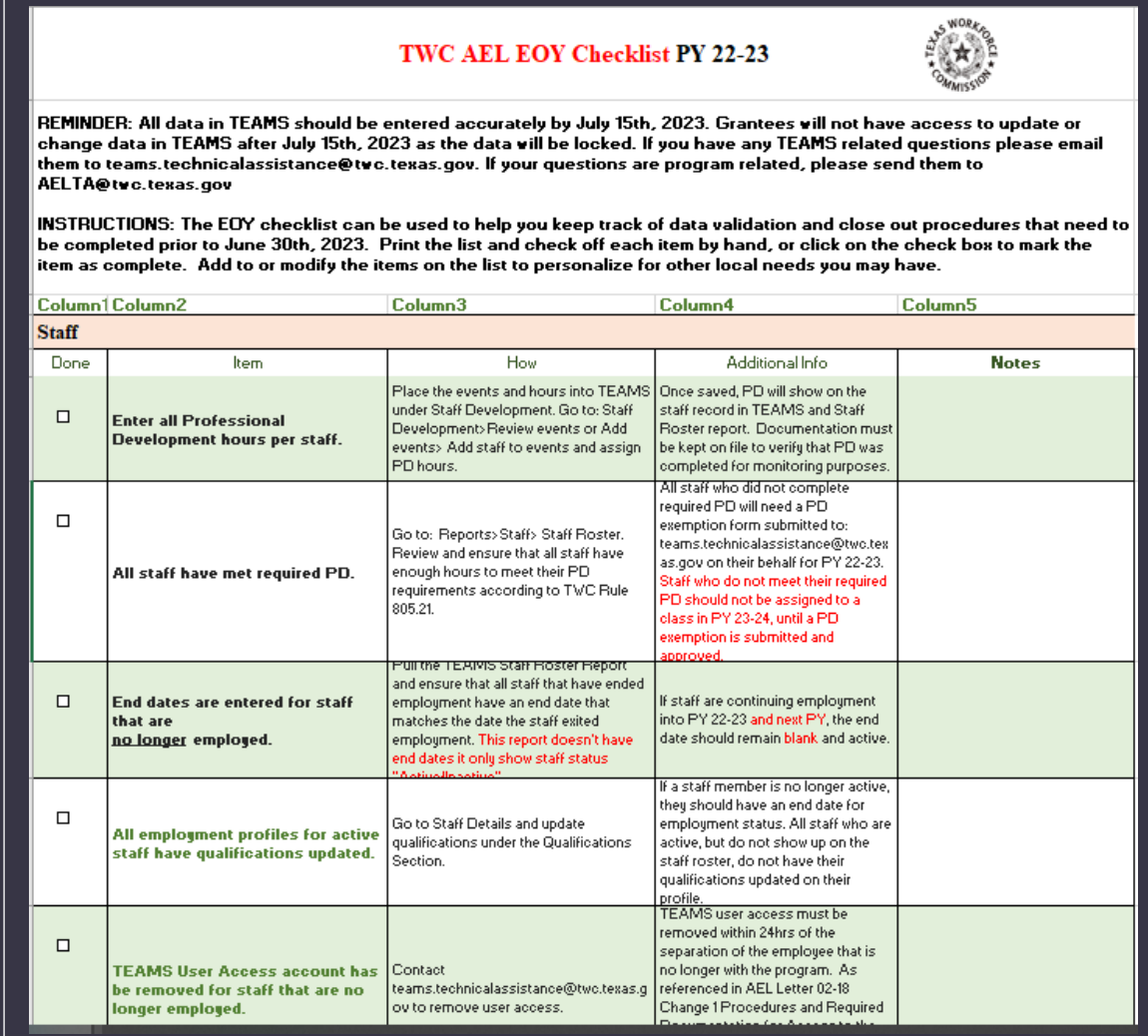
- Understand how the End of Year Checklist can specifically benefit your program
- Be able to tackle the end-of-year closeout duties more efficiently
- Come up with a team plan to distribute closeout responsibilities
- Leave better informed than when you started the webinar

What is the End of Year Checklist?

It is a tool used to assist programs with close out procedures.

It is not…

- Policy
- An "official" vetted TWC document
- Not all inclusive



TWC AEL EOY Checklist PY 22-23

REMINDER: All data in TEAMS should be entered accurately by July 15th, 2023. Grantees will not have access to update or change data in TEAMS after July 15th, 2023 as the data will be locked. If you have any TEAMS related questions please email them to teams.technicalassistance@twc.texas.gov. If your questions are program related, please send them to AELTA@twc.texas.gov

INSTRUCTIONS: The EOY checklist can be used to help you keep track of data validation and close out procedures that need to be completed prior to June 30th, 2023. Print the list and check off each item by hand, or click on the check box to mark the item as complete. Add to or modify the items on the list to personalize for other local needs you may have.

Column1	Column2	Column3	Column4	Column5
Staff				
Done	Item	How	Additional Info	**Notes**
☐	**Enter all Professional Development hours per staff.**	Place the events and hours into TEAMS under Staff Development. Go to: Staff Development>Review events or Add events> Add staff to events and assign PD hours.	Once saved, PD will show on the staff record in TEAMS and Staff Roster report. Documentation must be kept on file to verify that PD was completed for monitoring purposes.	
☐	**All staff have met required PD.**	Go to: Reports>Staff> Staff Roster. Review and ensure that all staff have enough hours to meet their PD requirements according to TWC Rule 805.21.	All staff who did not complete required PD will need a PD exemption form submitted to: teams.technicalassistance@twc.texas.gov on their behalf for PY 22-23. Staff who do not meet their required PD should not be assigned to a class in PY 23-24, until a PD exemption is submitted and approved.	
☐	**End dates are entered for staff that are no longer employed.**	Pull the TEAMS Staff Roster Report and ensure that all staff that have ended employment have an end date that matches the date the staff exited employment. This report doesn't have end dates it only show staff status "Active/Inactive"	If staff are continuing employment into PY 22-23 and next PY, the end date should remain blank and active.	
☐	**All employment profiles for active staff have qualifications updated.**	Go to Staff Details and update qualifications under the Qualifications Section.	If a staff member is no longer active, they should have an end date for employment status. All staff who are active, but do not show up on the staff roster, do not have their qualifications updated on their profile.	
☐	**TEAMS User Access account has be removed for staff that are no longer employed.**	Contact teams.technicalassistance@twc.texas.gov to remove user access.	TEAMS user access must be removed within 24hrs of the separation of the employee that is no longer with the program. As referenced in AEL Letter 02-18 Change 1 Procedures and Required	

Something to Remember

- Team Effort: Quite a few things to cover
- Tie Sensitive: A good amount of the items on the list need to be completed buy July 15th.
- Who on Your Staff Could Assist? Who has the experience or knowledge to get the tasks done?
- Who Will be the Lead? Who is the one person who has a reputation for following through and is good at delegating?

Prevent Missed Opportunities

- TEAMS closes July 15th for data entry and/or changes for PY 22-23 data
- Cannot reopen data
- Missed opportunities for enrollment, MSGs, Credentials, and employment

No Exceptions!

Areas Covered on Checklist

- Staff
- Participant
- Classes
- Training Services
- Validation and Data Sign Off
- Grant Management

Column Explanation

TWC AEL EOY Checklist PY 21-22

REMINDER: All data in TEAMS should be entered accurately by July 15th 2022. Grantees will not have access to update or change data in TEAMS after July 15th 2022 as the data will be locked. If you have any TEAMS related questions please email them to teams.technicalassistance@twc.texas.gov. If your questions are program related, please send them to AELTA@twc.texas.gov

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☐	**All employment profiles for active staff have qualifications updated.**	Go to Staff Details and update qualifications under the Qualifications Section.	If a staff member is no longer active, they should have an end date for employment. All staff who are active, but do not show up on the staff roster, do not have their qualifications updated on their profile.	
☐	**TEAMS account access has be removed for staff that are no longer employed.**	Contact teams.technicalassistance@twc.texas.gov to remove access.	Teams access must be removed within 24hrs of the separation of the employee that is longer with the program. Reference AEL Letter 02-18 Change 1 Procedures and Required Documentation for Access to the Texas Educating Adults Management System	

Resources Referenced

AEL Letters

TEAMS Reports

Resources

- Performance Guide
- Testing Guide
- AEL Guide

Staff

- Enter all Professional Development hours per staff.
- All staff have met required PD.
- End dates are entered for staff that are no longer employed.
- All employment profiles for active staff have qualifications updated.
- TEAMS User Access account has been removed for staff that are no longer employed.
- Annual Docusign P-41c Agreement and CyberSecurity submissions complete.
- Report any changes to grant required positions.
- Determine PD for the PY 23-24 PD Plan (Due June 30th).

Staff Roster Report

Texas Educating Adults Management System (TEAMS)

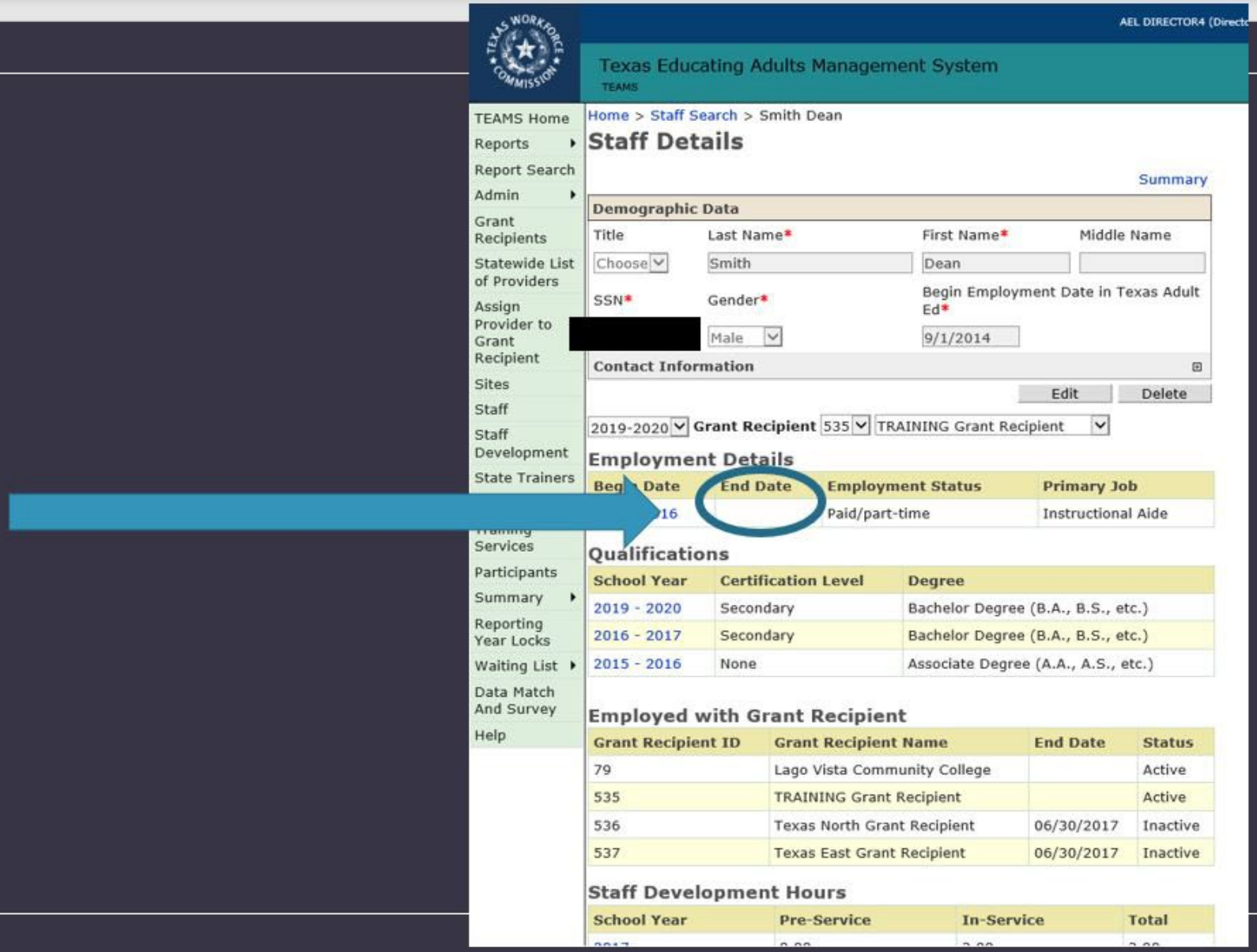
Staff Roster

School Year: 2020-2021
Reporting Group: **Regular Adult Ed. Reporting**
Order By: **Staff Name**
Staff Status: **All**

Grant Recipient: [redacted]
Number of Staff: **47**

# of Hours accrued

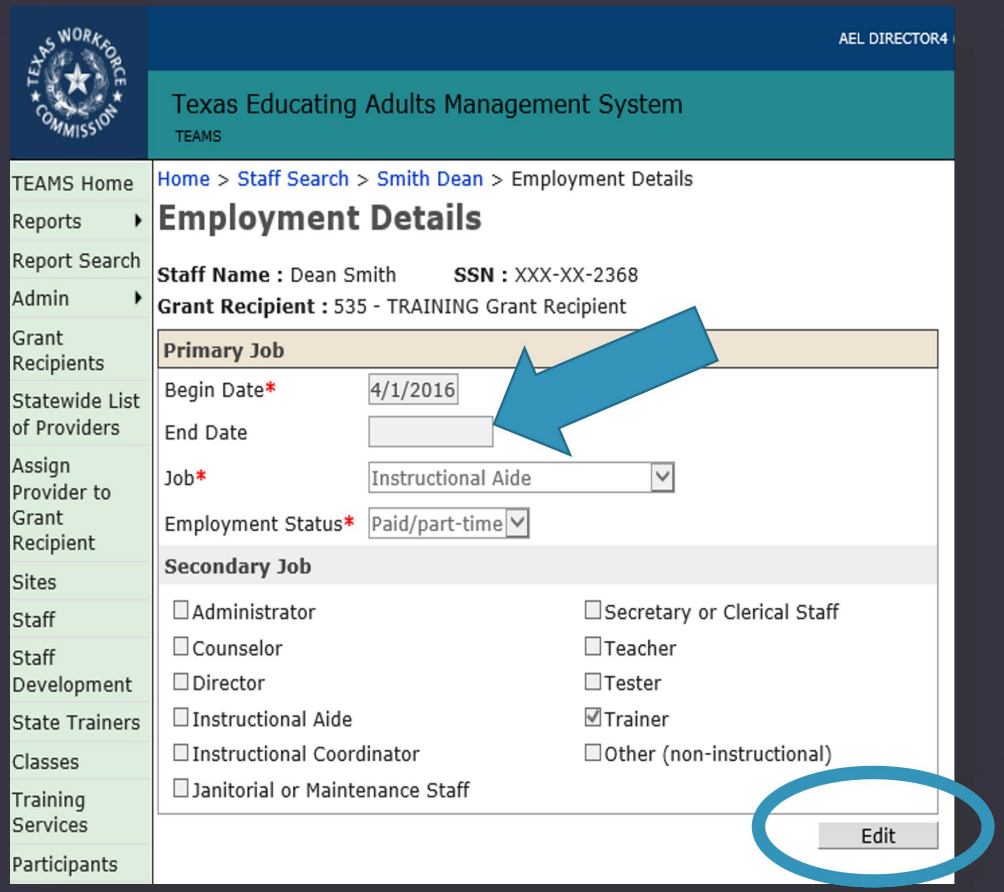
Staff Name	SSN	Primary Job	Staff Status	Highest Degree Obtained	Begin Employment Date in Texas Adult Ed	Certification Level	Number of In-service Hours Accrued to Date	Required In-service Hours
[redacted]		Literacy Instructor	Active	Bachelor Degree (B.A., B.S., etc.)	03/05/2019	Secondary	15.60	0
[redacted]		Literacy Instructor	Active	Bachelor Degree (B.A., B.S., etc.)	12/03/2019	None	10.77	0
[redacted]		Literacy Instructor	Active	Master Degree (M.Ed., M.A., etc.)	02/18/2016	Secondary	33.00	0

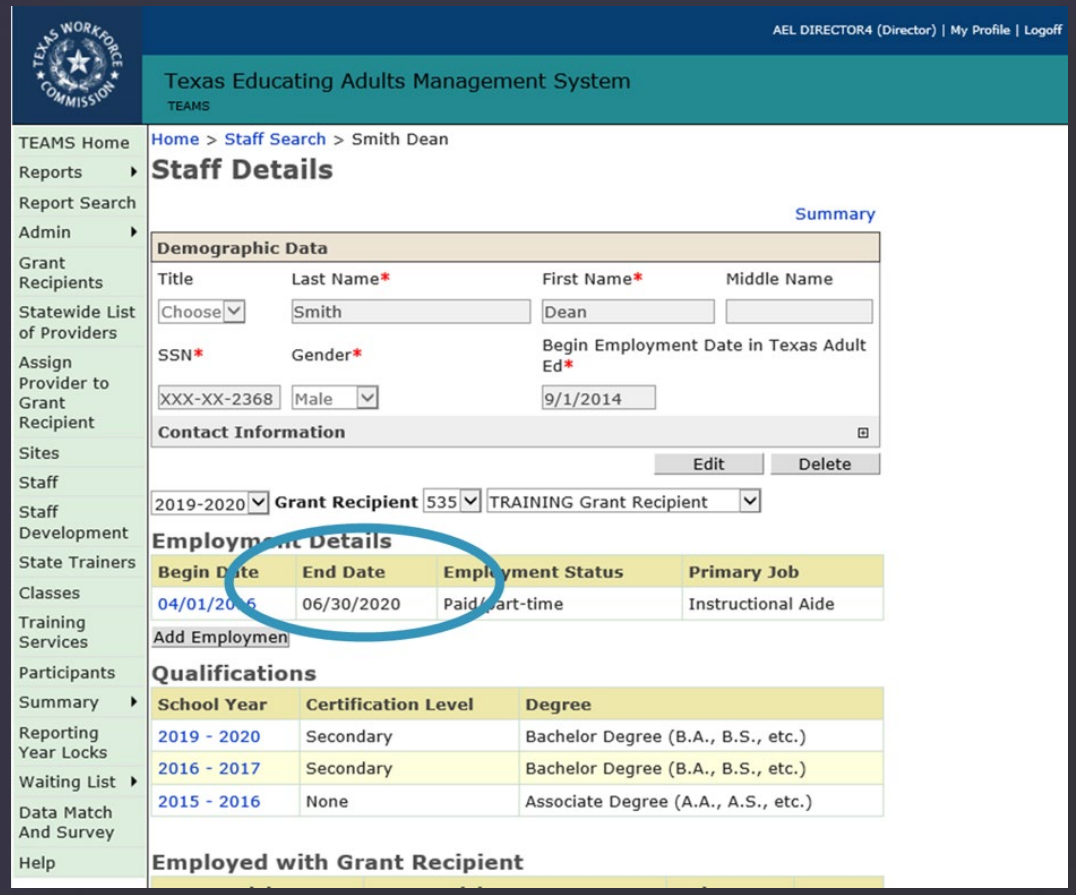


Staff Details

Add End Date for Staff Not Returning for the Next Program Year

Employment and Staff Details



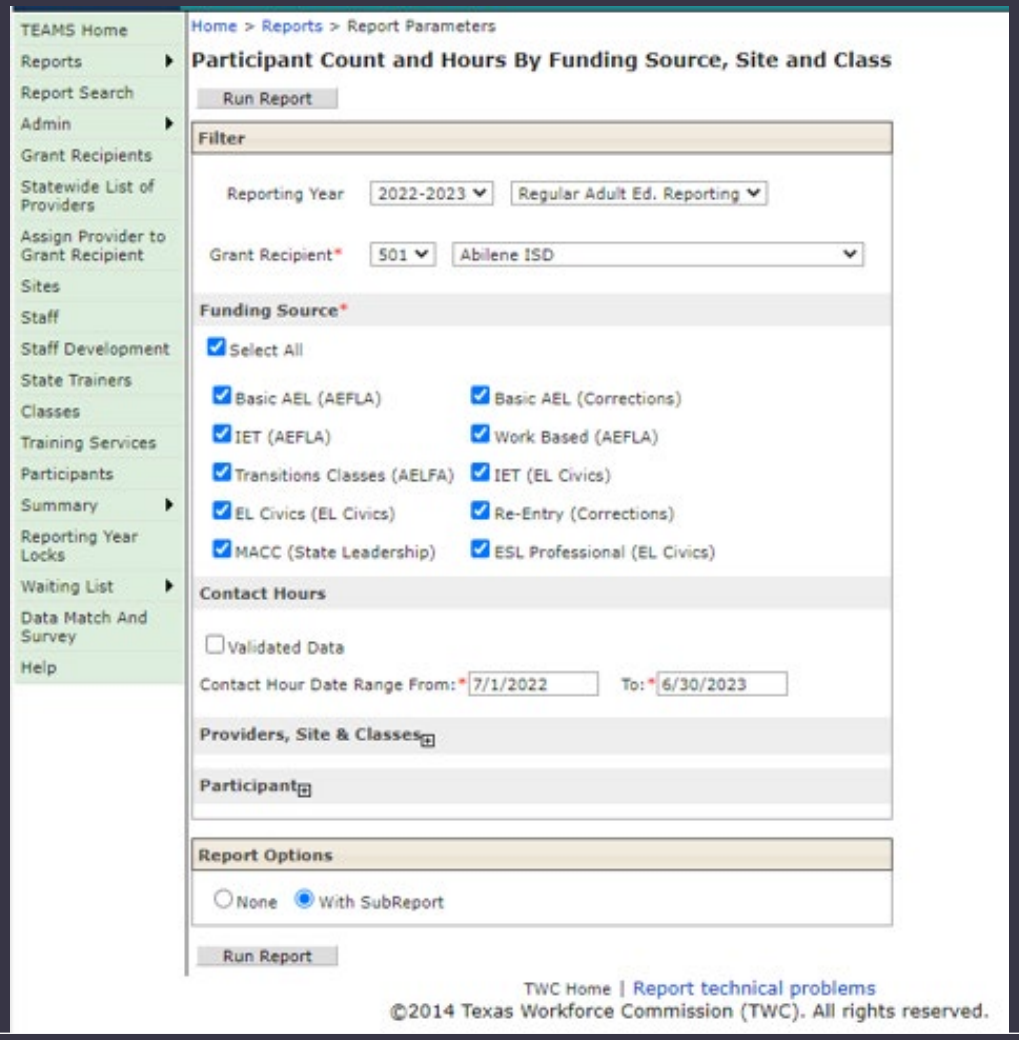


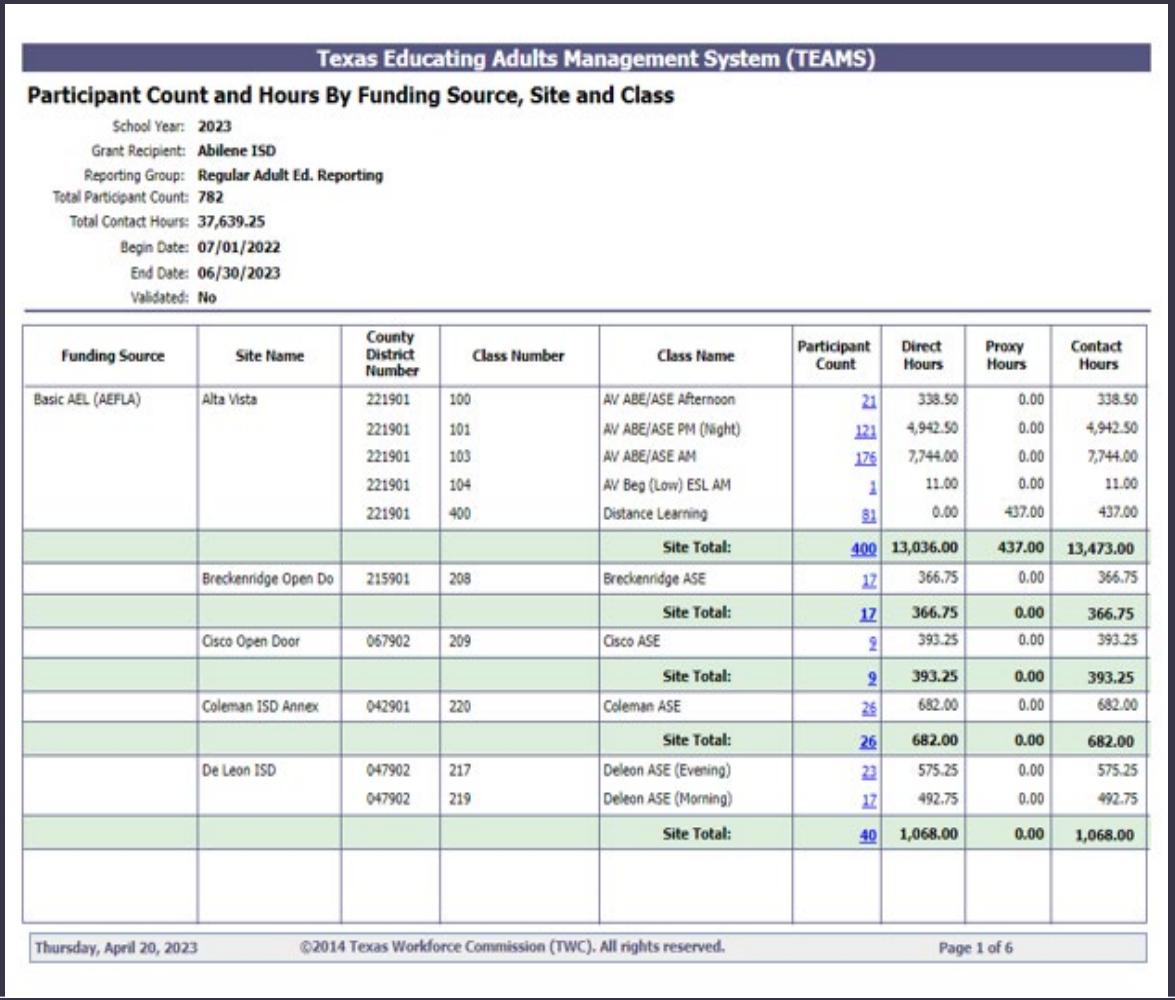
Participant

- Verify orientation and eligibility documentation is in file.
- Verify that all participants have a least one recorded orientation in TEAMS per period of participation.
- Evaluate TEAMS data for potential funding source coding issues.
- All Intensive Service class participants are coded with the appropriate activity/fund code.
- All IET or Integrated El Civics class participants are coded with the appropriate activity/fund code.

Very Important Report!

Participant Count and Hours by Funding Source, Site, and Class Report





Texas Educating Adults Management System (TEAMS)

Participant Count and Hours By Funding Source, Site and Class

School Year: **2023**
Grant Recipient: **Abilene ISD**
Reporting Group: **Regular Adult Ed. Reporting**
Total Participant Count: **782**
Total Contact Hours: **37,639.25**
Begin Date: **07/01/2022**
End Date: **06/30/2023**
Validated: **No**

Funding Source	Site Name	County District Number	Class Number	Class Name	Participant Count	Direct Hours	Proxy Hours	Contact Hours
Basic AEL (AEFLA)	Alta Vista	221901	100	AV ABE/ASE Afternoon	21	338.50	0.00	338.50
		221901	101	AV ABE/ASE PM (Night)	121	4,942.50	0.00	4,942.50
		221901	103	AV ABE/ASE AM	176	7,744.00	0.00	7,744.00
		221901	104	AV Beg (Low) ESL AM	1	11.00	0.00	11.00
		221901	400	Distance Learning	81	0.00	437.00	437.00
				Site Total:	**400**	**13,036.00**	**437.00**	**13,473.00**
	Breckenridge Open Do	215901	208	Breckenridge ASE	17	366.75	0.00	366.75
				Site Total:	**17**	**366.75**	**0.00**	**366.75**
	Cisco Open Door	067902	209	Cisco ASE	9	393.25	0.00	393.25
				Site Total:	**9**	**393.25**	**0.00**	**393.25**
	Coleman ISD Annex	042901	220	Coleman ASE	26	682.00	0.00	682.00
				Site Total:	**26**	**682.00**	**0.00**	**682.00**
	De Leon ISD	047902	217	Deleon ASE (Evening)	23	575.25	0.00	575.25
		047902	219	Deleon ASE (Morning)	17	492.75	0.00	492.75
				Site Total:	**40**	**1,068.00**	**0.00**	**1,068.00**

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Item: Spot Check Files

Participant

- All contact hour documentation (sign-in sheets) matches what is reported in TEAMS.
- Individuals participating in IET, Intensive Services or Distance Learning have reached participant status with 12 direct hours.
- Ensure all participants who have been tested early have justification in their file for being tested early.
- Test participants who have tests set to expire.
- Participant notes in participant profiles have been updated.

Establishing a Baseline for PY 23-24

Program Year PY 22-23

Program Year PY 23-24

Valid Test

Valid test – not yet expired.

Need to establish a Baseline for the new program year.

CLASS

Participant put into a class first and earns direct contact hour first. The valid test will be pulled forward establishing the baseline.

Post Test

Next test will be a post-test.

Valid Test

Valid test – not yet expired.

New Test – New Baseline

Tested before first direct contact hour entered into TEAMS. This will now be a new baseline and not a Gain.

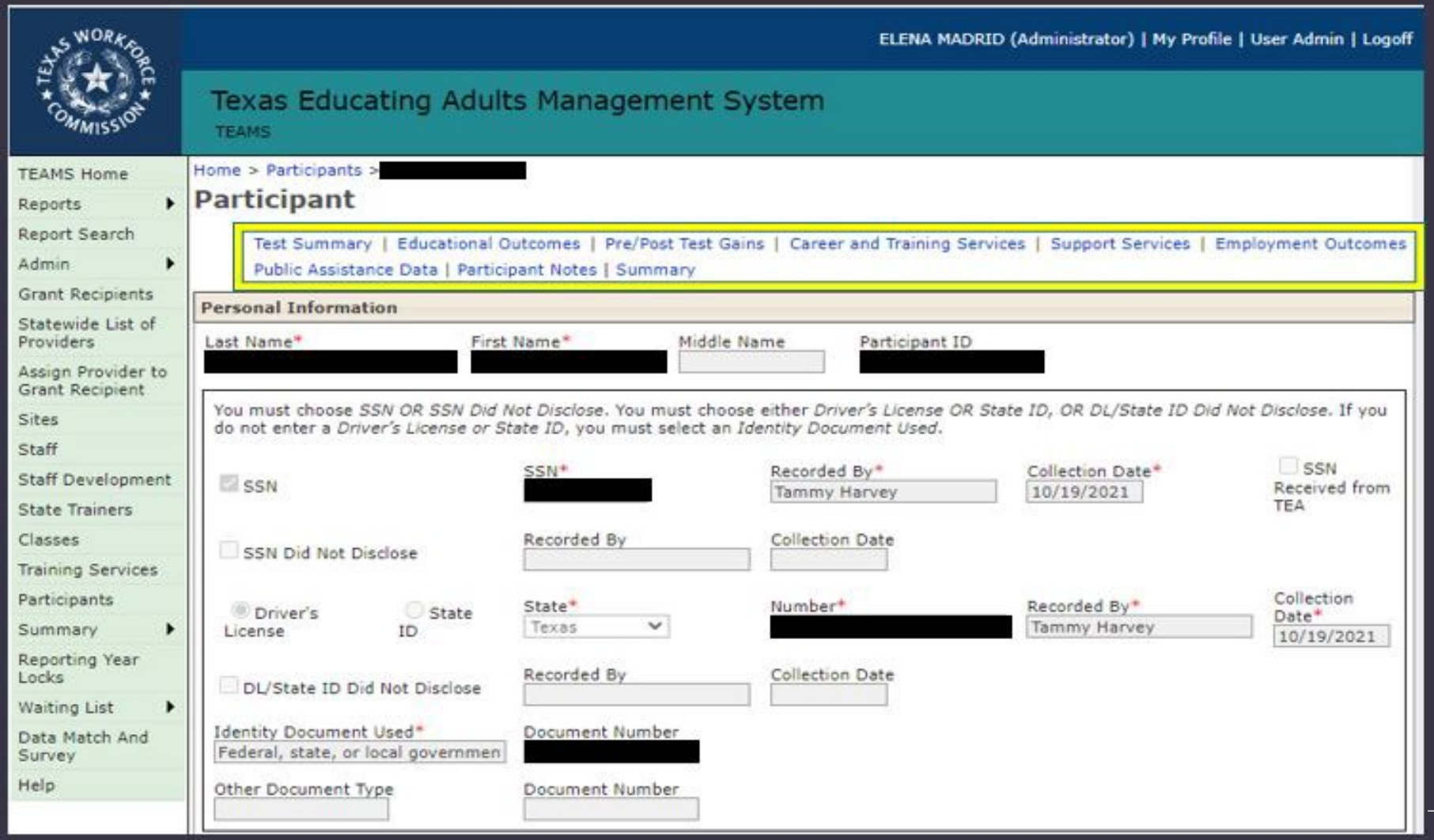
CLASS

Participant put into class after getting tested in the new program year. You will now have to test, again, for a post-test gain against the new baseline.

Participant

- Employment Outcomes, Educational Outcomes and Career and Service Details are captured in TEAMS.
- Update Exclusions for participants no longer participating in services who are eligible for these exclusions.
- Enter “Planned GAP” for participants who will be without services for more than 90 days.

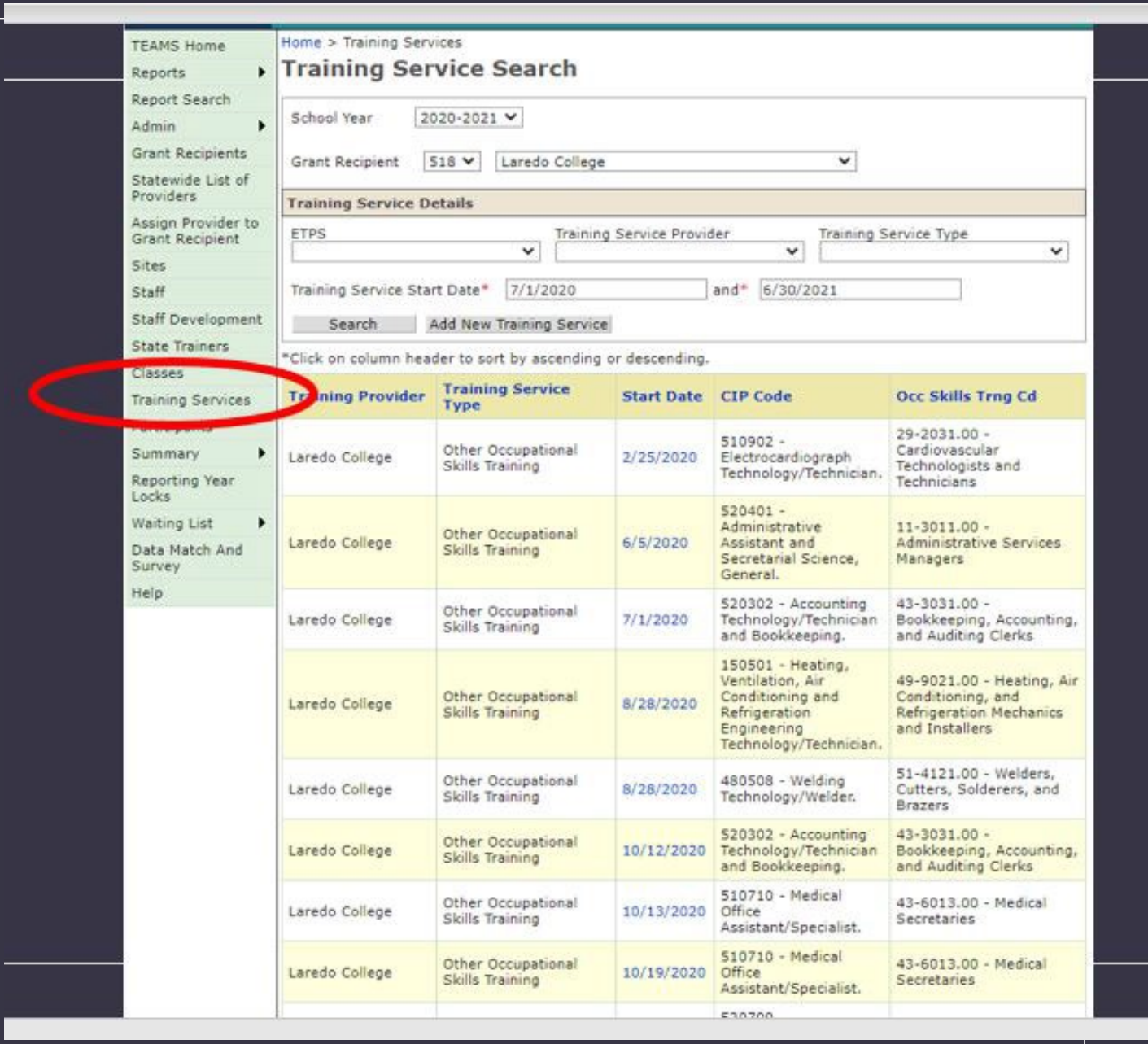
Employment Outcomes, Educational Outcomes and Career and Service Details



Classes

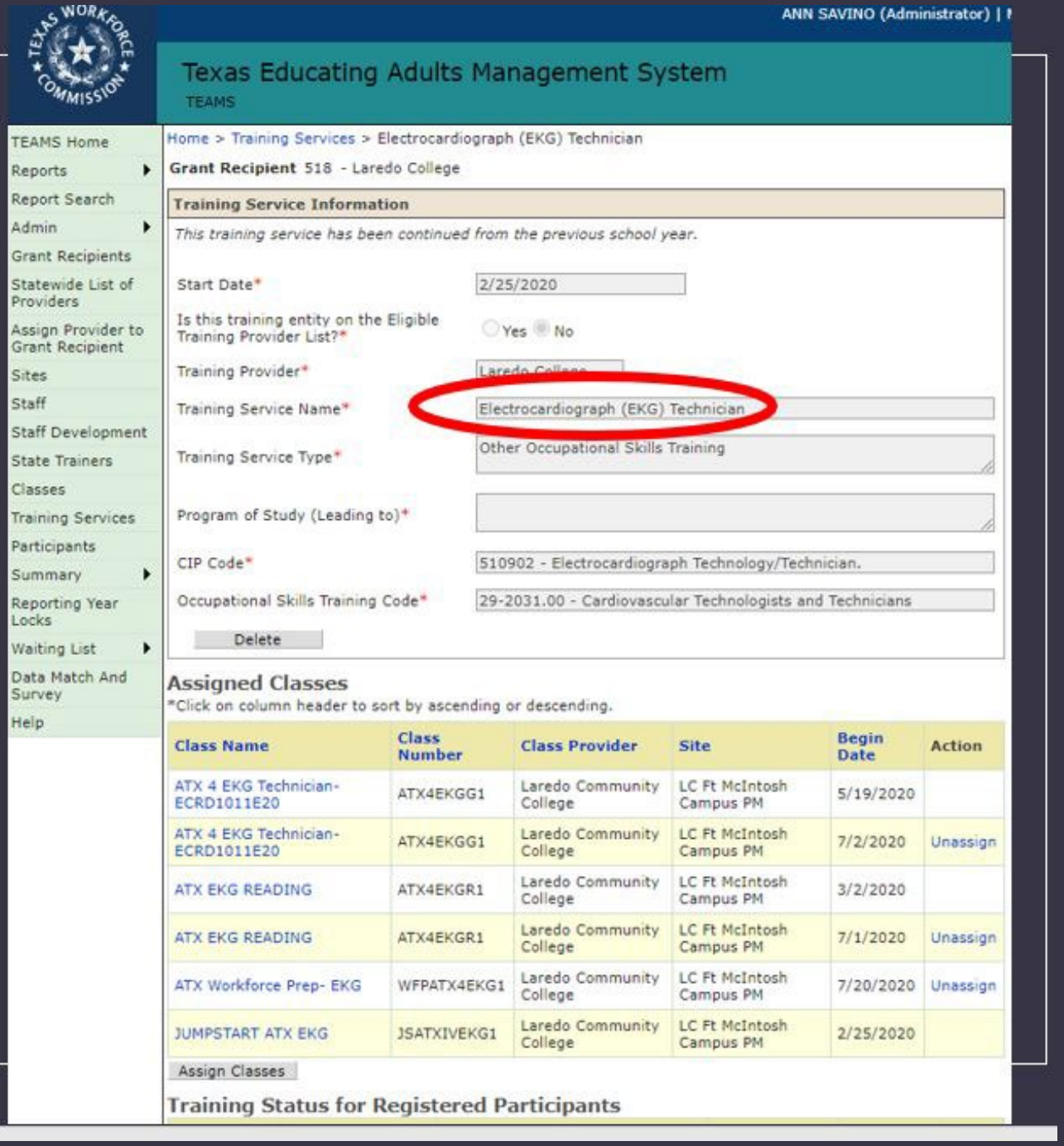
- Start and end dates for all classes match when service took place.
- All IET classes are attached to the correct “Training Service” in TEAMS.
- Training hours are recorded in TEAMS for all participants in IET training classes in accordance with AEL Letter 02-16, Change 1 guidance.

Check for Training Services and Classes attached to Training Services **(1)**



Training Provider	Training Service Type	Start Date	CIP Code	Occ Skills Trng Cd
Laredo College	Other Occupational Skills Training	2/25/2020	510902 - Electrocardiograph Technology/Technician.	29-2031.00 - Cardiovascular Technologists and Technicians
Laredo College	Other Occupational Skills Training	6/5/2020	520401 - Administrative Assistant and Secretarial Science, General.	11-3011.00 - Administrative Services Managers
Laredo College	Other Occupational Skills Training	7/1/2020	520302 - Accounting Technology/Technician and Bookkeeping.	43-3031.00 - Bookkeeping, Accounting, and Auditing Clerks
Laredo College	Other Occupational Skills Training	8/28/2020	150501 - Heating, Ventilation, Air Conditioning and Refrigeration Engineering Technology/Technician.	49-9021.00 - Heating, Air Conditioning, and Refrigeration Mechanics and Installers
Laredo College	Other Occupational Skills Training	8/28/2020	480508 - Welding Technology/Welder.	51-4121.00 - Welders, Cutters, Solderers, and Brazers
Laredo College	Other Occupational Skills Training	10/12/2020	520302 - Accounting Technology/Technician and Bookkeeping.	43-3031.00 - Bookkeeping, Accounting, and Auditing Clerks
Laredo College	Other Occupational Skills Training	10/13/2020	510710 - Medical Office Assistant/Specialist.	43-6013.00 - Medical Secretaries
Laredo College	Other Occupational Skills Training	10/19/2020	510710 - Medical Office Assistant/Specialist.	43-6013.00 - Medical Secretaries

Check for Training Services and Classes attached to Training Services **(2)**



Check for Training Hours for IET Participants:

Pull participant count & hours by funding source, site, and class

Texas Educating Adults Management System (TEAMS)

Participant Count and Hours By Funding Source, Site and Class

School Year: **2021**
Grant Recipient: **Ysleta ISD for the Far West AE**
Reporting Group: **Regular Adult Ed. Reporting**
Total Participant Count: **206**
Total Contact Hours: **5,608.50**
Begin Date: **07/01/2020**
End Date: **06/30/2021**
Validated: **No**

Funding Source	Site Name	County District Number	Class Number	Class Name	Participant Count	Direct Hours	Proxy Hours	Contact Hours
IET (AEFLA)	Center Career and Tec	071902	BAUWEL	E-TRAINING WELDING	19	0.00	0.00	0.00
		071902	GONZABS	E-TRAINING AUTO BRAKE SYS	4	0.00	0.00	0.00
		071902	MONELE	E-TRAINING ELECTRICAL	9	0.00	0.00	0.00
				Site Total:	**32**	**0.00**	**0.00**	**0.00**
	El Dorado High School	071909	CALDNT	S-COMP MAINT	4	74.50	0.00	74.50
				Site Total:	**4**	**74.50**	**0.00**	**74.50**
	Montwood High Schoo	071909	ARIAJAMS	S-COMP MAINT AND REPAIR I	13	0.00	0.00	0.00
		071909	ARIAJNT	S-COMP MAINT AND REPAIR I	20	0.00	0.00	0.00
				Site Total:	**33**	**0.00**	**0.00**	**0.00**
	Options High School	071909	AREWAM/PM	S-OFFICE ADM	14	0.00	0.00	0.00
		071909	MAYATNT	S-OFFICE ADM	17	0.00	0.00	0.00
		071909	RODMEAM/PM	S-OFFICE ADM BS	14	172.00	0.00	172.00
		071909	RODMEAM2	S-COMP MAINT AND REPAIR I	13	254.75	0.00	254.75
		071909	RODMENT1	S-OFFICE ADM BS	16	260.75	0.00	260.75
		071909	RODMENT2	S-COMP MAINT AND REPAIR I	20	630.00	0.00	630.00
				Site Total:	**94**	**1,317.50**	**0.00**	**1,317.50**

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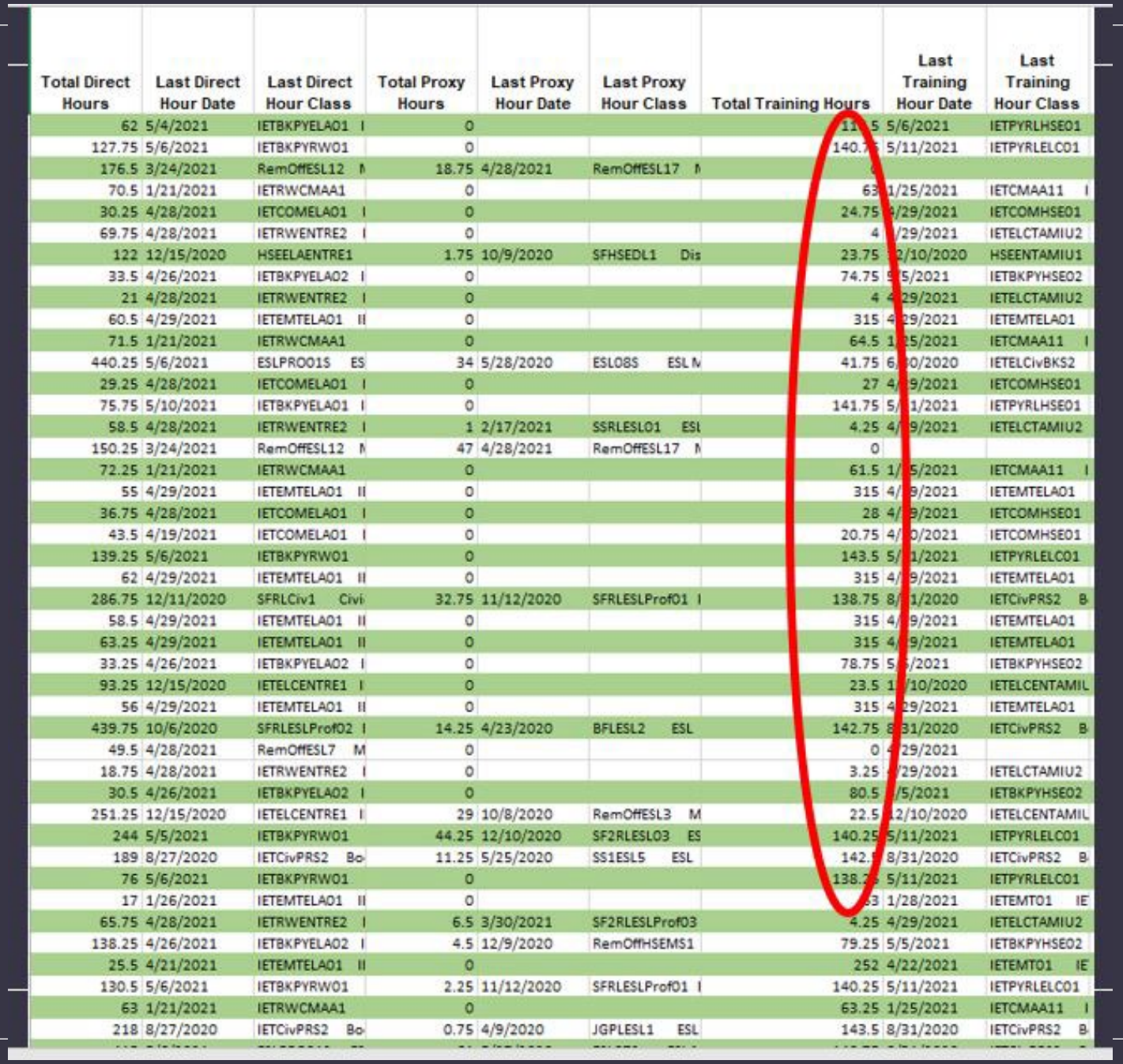
Check for Training Hours for IET Participants:

Pull POP Report



Total Direct Hours	Last Direct Hour Date	Last Direct Hour Class	Total Proxy Hours	Last Proxy Hour Date	Last Proxy Hour Class	Total Training Hours	Last Training Hour Date	Last Training Hour Class
62	5/4/2021	IETBKPYELA01 I	0			11 5	5/6/2021	IETPYRLHSE01
127.75	5/6/2021	IETBKPYRW01	0			140.7	5/11/2021	IETPYRLELC01
176.5	3/24/2021	RemOffESL12 M	18.75	4/28/2021	RemOffESL17 M			
70.5	1/21/2021	IETRWCMAA1	0			63	1/25/2021	IETCMAA11 I
30.25	4/28/2021	IETCOMELA01 I	0			24.75	4/29/2021	IETCOMHSE01
69.75	4/28/2021	IETRWENTRE2 I	0			4	4/29/2021	IETELCTAMIU2
122	12/15/2020	HSEELAENTRE1	1.75	10/9/2020	SFHSEDL1 Dis	23.75	12/10/2020	HSEENTAMIU1
33.5	4/26/2021	IETBKPYELA02 I	0			74.75	5/5/2021	IETBKPYHSE02
21	4/28/2021	IETRWENTRE2 I	0			4	4/29/2021	IETELCTAMIU2
60.5	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
71.5	1/21/2021	IETRWCMAA1	0			64.5	1/25/2021	IETCMAA11 I
440.25	5/6/2021	ESLPRO01S ES	34	5/28/2020	ESL08S ESL M	41.75	6/30/2020	IETELCivBKS2
29.25	4/28/2021	IETCOMELA01 I	0			27	4/29/2021	IETCOMHSE01
75.75	5/10/2021	IETBKPYELA01 I	0			141.75	5/11/2021	IETPYRLHSE01
58.5	4/28/2021	IETRWENTRE2 I	1	2/17/2021	SSRLESL01 ESL	4.25	4/29/2021	IETELCTAMIU2
150.25	3/24/2021	RemOffESL12 M	47	4/28/2021	RemOffESL17 M	0		
72.25	1/21/2021	IETRWCMAA1	0			61.5	1/25/2021	IETCMAA11 I
55	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
36.75	4/28/2021	IETCOMELA01 I	0			28	4/29/2021	IETCOMHSE01
43.5	4/19/2021	IETCOMELA01 I	0			20.75	4/30/2021	IETCOMHSE01
139.25	5/6/2021	IETBKPYRW01	0			143.5	5/11/2021	IETPYRLELC01
62	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
286.75	12/11/2020	SFRLCiv1 Civi	32.75	11/12/2020	SFRLESLProf01 I	138.75	8/31/2020	IETCivPRS2 B
58.5	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
63.25	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
33.25	4/26/2021	IETBKPYELA02 I	0			78.75	5/5/2021	IETBKPYHSE02
93.25	12/15/2020	IETELCENTRE1 I	0			23.5	12/10/2020	IETELCENTAMIL
56	4/29/2021	IETEMTELA01 II	0			315	4/29/2021	IETEMTELA01
439.75	10/6/2020	SFRLESLProf02 I	14.25	4/23/2020	BFLESL2 ESL	142.75	8/31/2020	IETCivPRS2 B
49.5	4/28/2021	RemOffESL7 M	0			0	4/29/2021	
18.75	4/28/2021	IETRWENTRE2 I	0			3.25	4/29/2021	IETELCTAMIU2
30.5	4/26/2021	IETBKPYELA02 I	0			80.5	5/5/2021	IETBKPYHSE02
251.25	12/15/2020	IETELCENTRE1 I	29	10/8/2020	RemOffESL3 M	22.5	12/10/2020	IETELCENTAMIL
244	5/5/2021	IETBKPYRW01	44.25	12/10/2020	SF2RLESL03 ES	140.25	5/11/2021	IETPYRLELC01
189	8/27/2020	IETCivPRS2 Bo	11.25	5/25/2020	SS1ESL5 ESL	142.7	8/31/2020	IETCivPRS2 B
76	5/6/2021	IETBKPYRW01	0			138.2	5/11/2021	IETPYRLELC01
17	1/26/2021	IETEMTELA01 II	0			63	1/28/2021	IETEMT01 IE
65.75	4/28/2021	IETRWENTRE2 I	6.5	3/30/2021	SF2RLESLProf03	4.25	4/29/2021	IETELCTAMIU2
138.25	4/26/2021	IETBKPYELA02 I	4.5	12/9/2020	RemOffHSEMS1	79.25	5/5/2021	IETBKPYHSE02
25.5	4/21/2021	IETEMTELA01 II	0			252	4/22/2021	IETEMT01 IE
130.5	5/6/2021	IETBKPYRW01	2.25	11/12/2020	SFRLESLProf01 I	140.25	5/11/2021	IETPYRLELC01
63	1/21/2021	IETRWCMAA1	0			63.25	1/25/2021	IETCMAA11 I
218	8/27/2020	IETCivPRS2 Bo	0.75	4/9/2020	JGPLESL1 ESL	143.5	8/31/2020	IETCivPRS2 B

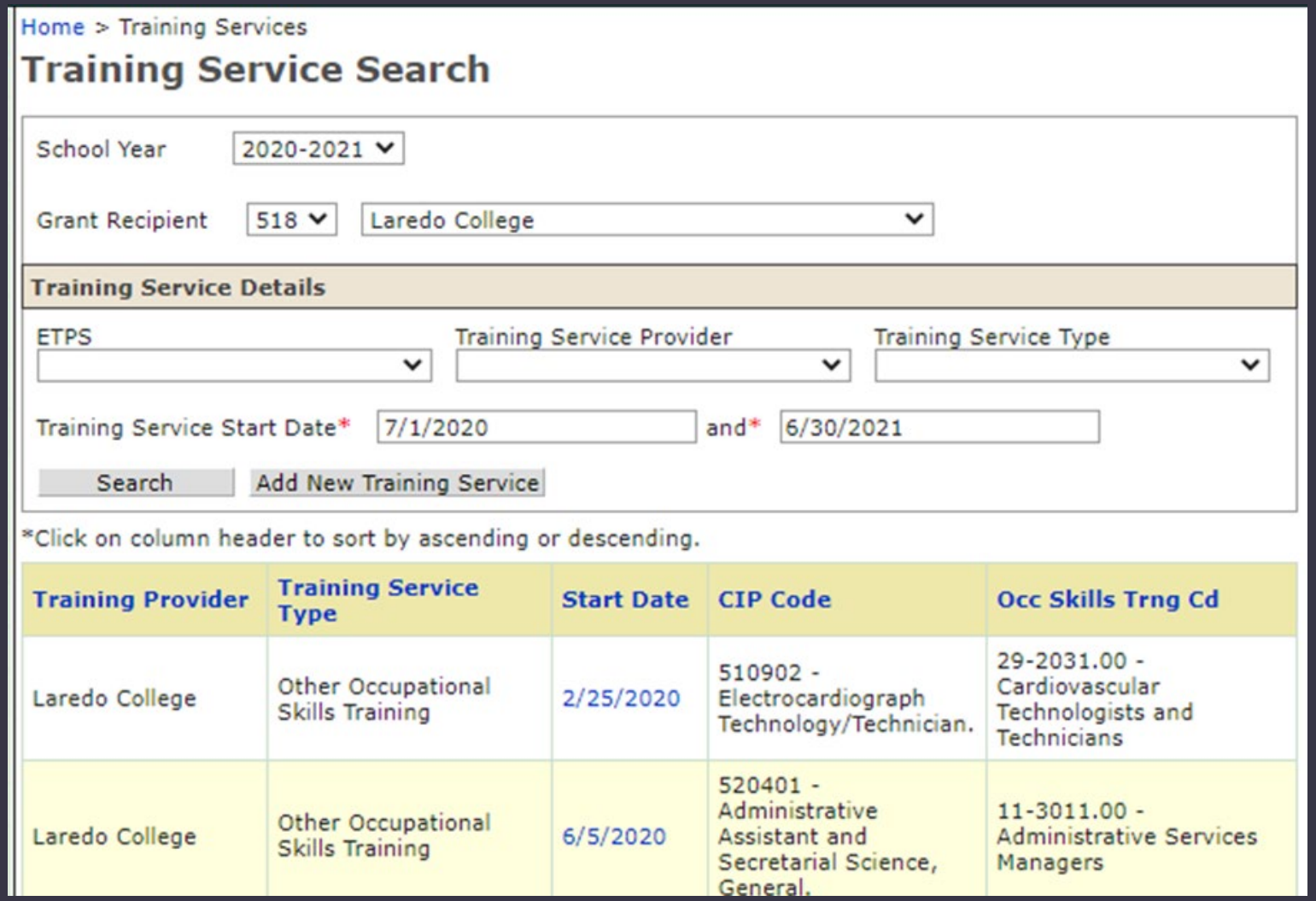
Important Notice

- No Roll over of classes this program year!
- Training services can continue!

Training Services

- All IETs have a Training Service set up in TEAMS and all classes for the training service are attached.
- Training Service State Date(s) match Training Class Start Date(s).
- All IET coded students are attached to a Training Service.
- All participants in Training Services (IETs) are updated to either Completed/Withdrew).

Training Services are different from classes set up for training and capturing training hours.



Home > Training Services

Training Service Search

School Year: 2020-2021

Grant Recipient: 518 Laredo College

Training Service Details

ETPS | Training Service Provider | Training Service Type

Training Service Start Date* 7/1/2020 and* 6/30/2021

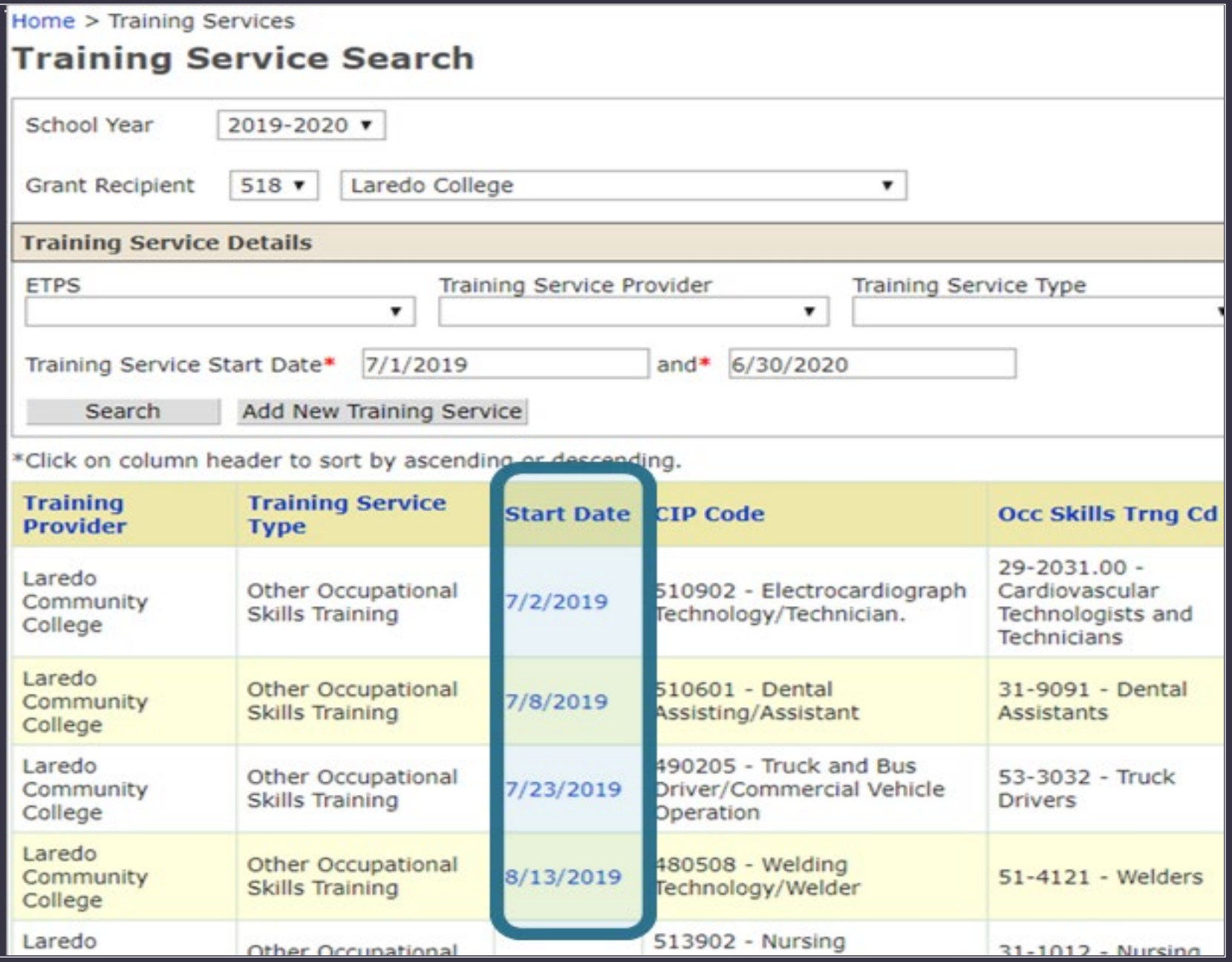
Search | Add New Training Service

*Click on column header to sort by ascending or descending.

Training Provider	Training Service Type	Start Date	CIP Code	Occ Skills Trng Cd
Laredo College	Other Occupational Skills Training	2/25/2020	510902 - Electrocardiograph Technology/Technician.	29-2031.00 - Cardiovascular Technologists and Technicians
Laredo College	Other Occupational Skills Training	6/5/2020	520401 - Administrative Assistant and Secretarial Science, General.	11-3011.00 - Administrative Services Managers

Ensure Training Services are updated for those IET Exiters (1):

(Update as completed or withdrawn)



Home > Training Services

Training Service Search

School Year: 2019-2020

Grant Recipient: 518 Laredo College

Training Service Details

ETPS | Training Service Provider | Training Service Type

Training Service Start Date* 7/1/2019 and* 6/30/2020

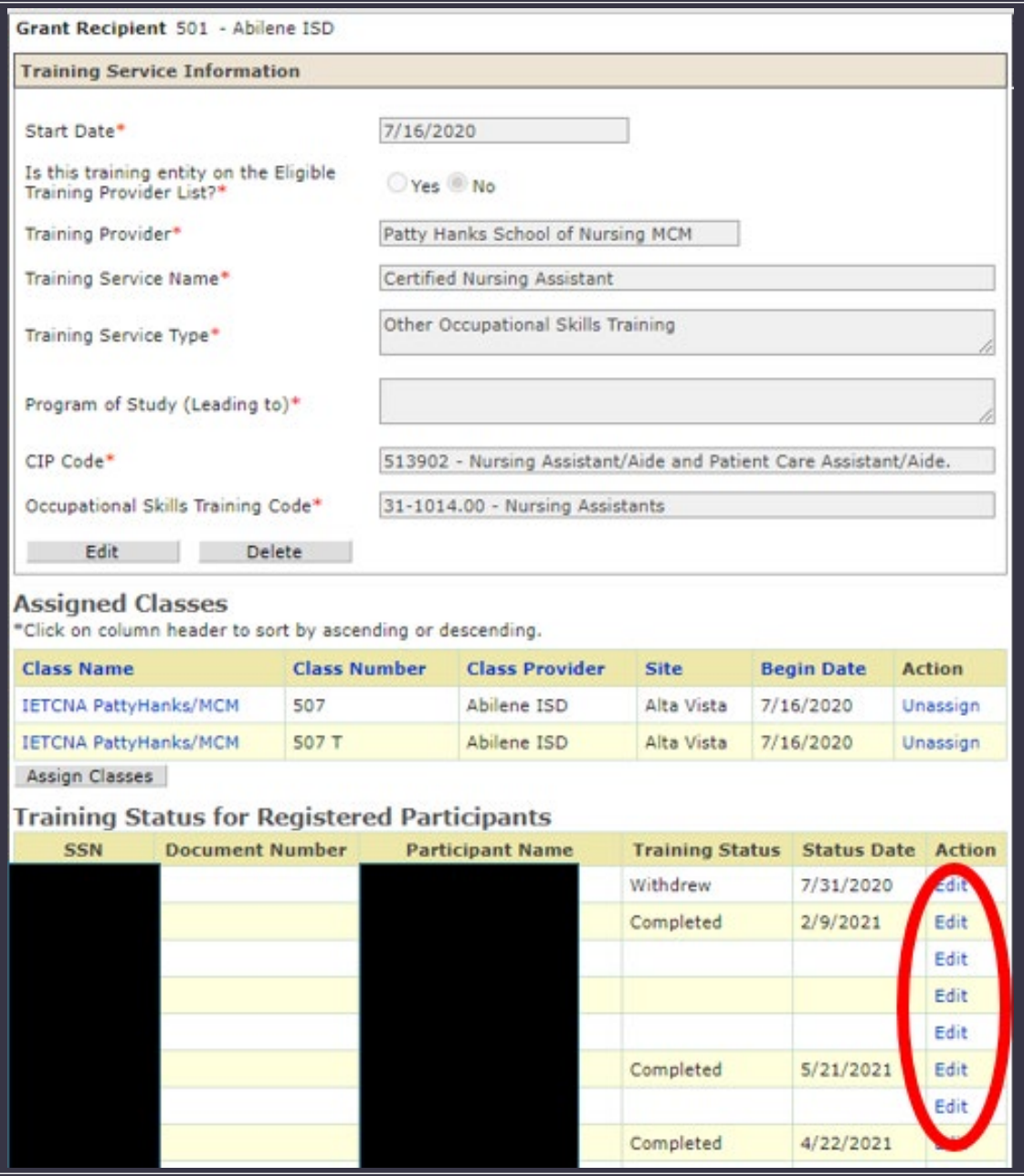
Search | Add New Training Service

*Click on column header to sort by ascending or descending.

Training Provider	Training Service Type	Start Date	CIP Code	Occ Skills Trng Cd
Laredo Community College	Other Occupational Skills Training	7/2/2019	510902 - Electrocardiograph Technology/Technician.	29-2031.00 - Cardiovascular Technologists and Technicians
Laredo Community College	Other Occupational Skills Training	7/8/2019	510601 - Dental Assisting/Assistant	31-9091 - Dental Assistants
Laredo Community College	Other Occupational Skills Training	7/23/2019	490205 - Truck and Bus Driver/Commercial Vehicle Operation	53-3032 - Truck Drivers
Laredo Community College	Other Occupational Skills Training	8/13/2019	480508 - Welding Technology/Welder	51-4121 - Welders
Laredo	Other Occupational		513902 - Nursing	31-1012 - Nursing

Ensure Training Services are updated for those IET Exiters (2).

(Update as completed or withdrawn).



Grant Recipient 501 - Abilene ISD

Training Service Information

Start Date*	7/16/2020
Is this training entity on the Eligible Training Provider List?*	Yes / No
Training Provider*	Patty Hanks School of Nursing MCM
Training Service Name*	Certified Nursing Assistant
Training Service Type*	Other Occupational Skills Training
Program of Study (Leading to)*	
CIP Code*	513902 - Nursing Assistant/Aide and Patient Care Assistant/Aide.
Occupational Skills Training Code*	31-1014.00 - Nursing Assistants

Edit Delete

Assigned Classes

*Click on column header to sort by ascending or descending.

Class Name	Class Number	Class Provider	Site	Begin Date	Action
IETCNA PattyHanks/MCM	507	Abilene ISD	Alta Vista	7/16/2020	Unassign
IETCNA PattyHanks/MCM	507 T	Abilene ISD	Alta Vista	7/16/2020	Unassign

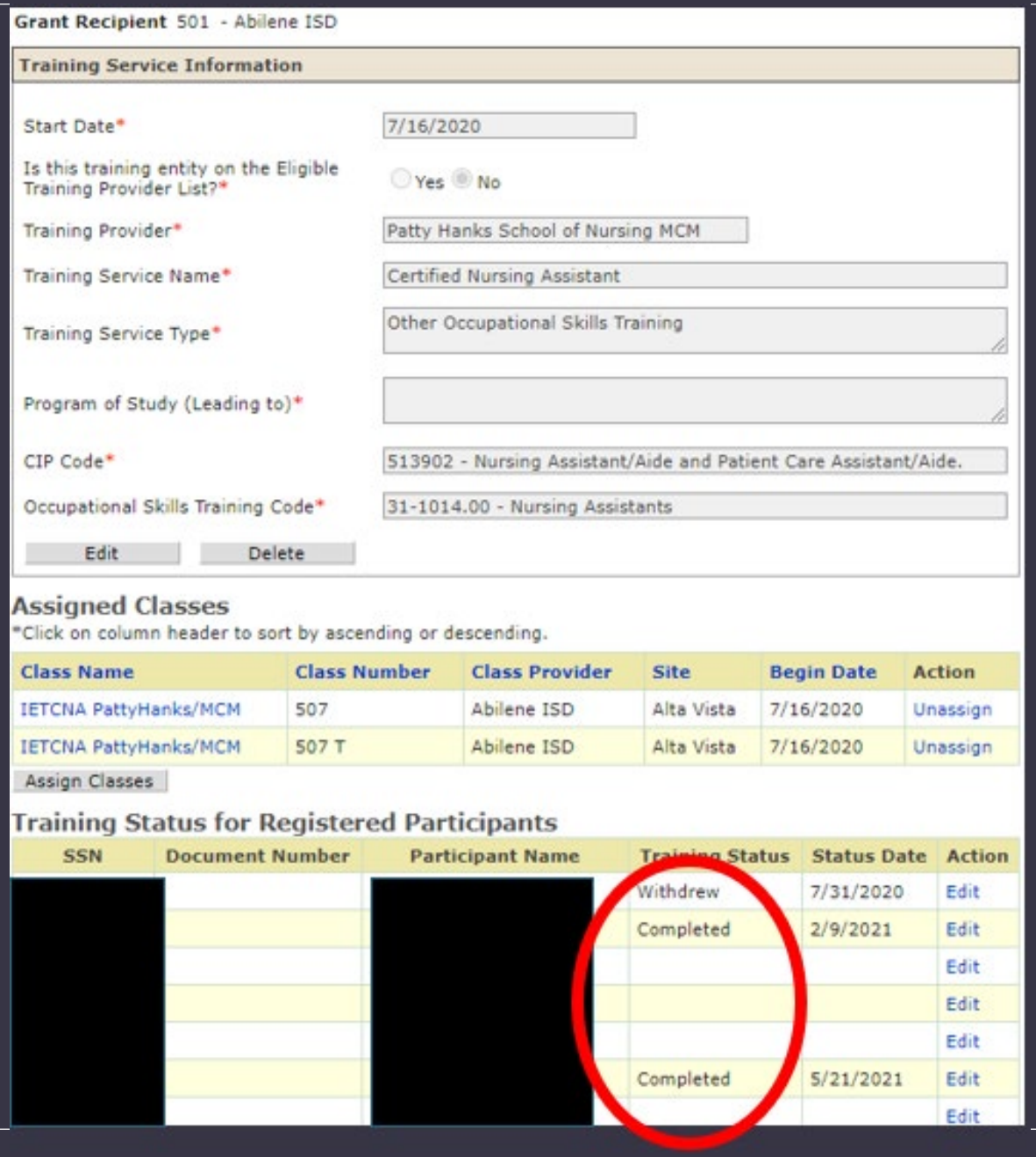
Assign Classes

Training Status for Registered Participants

SSN	Document Number	Participant Name	Training Status	Status Date	Action
[redacted]		[redacted]	Withdrew	7/31/2020	Edit
			Completed	2/9/2021	Edit
					Edit
					Edit
					Edit
			Completed	5/21/2021	Edit
					Edit
			Completed	4/22/2021	

Ensure Training Services are updated for those IET Exiters (3)

(Update as completed or withdrawn)



Grant Recipient 501 - Abilene ISD

Training Service Information

Start Date*	7/16/2020
Is this training entity on the Eligible Training Provider List?*	Yes / No
Training Provider*	Patty Hanks School of Nursing MCM
Training Service Name*	Certified Nursing Assistant
Training Service Type*	Other Occupational Skills Training
Program of Study (Leading to)*	
CIP Code*	513902 - Nursing Assistant/Aide and Patient Care Assistant/Aide.
Occupational Skills Training Code*	31-1014.00 - Nursing Assistants

Edit Delete

Assigned Classes

*Click on column header to sort by ascending or descending.

Class Name	Class Number	Class Provider	Site	Begin Date	Action
IETCNA PattyHanks/MCM	507	Abilene ISD	Alta Vista	7/16/2020	Unassign
IETCNA PattyHanks/MCM	507 T	Abilene ISD	Alta Vista	7/16/2020	Unassign

Assign Classes

Training Status for Registered Participants

SSN	Document Number	Participant Name	Training Status	Status Date	Action
[redacted]		[redacted]	Withdrew	7/31/2020	Edit
			Completed	2/9/2021	Edit
					Edit
					Edit
					Edit
			Completed	5/21/2021	Edit
					Edit

Training Services

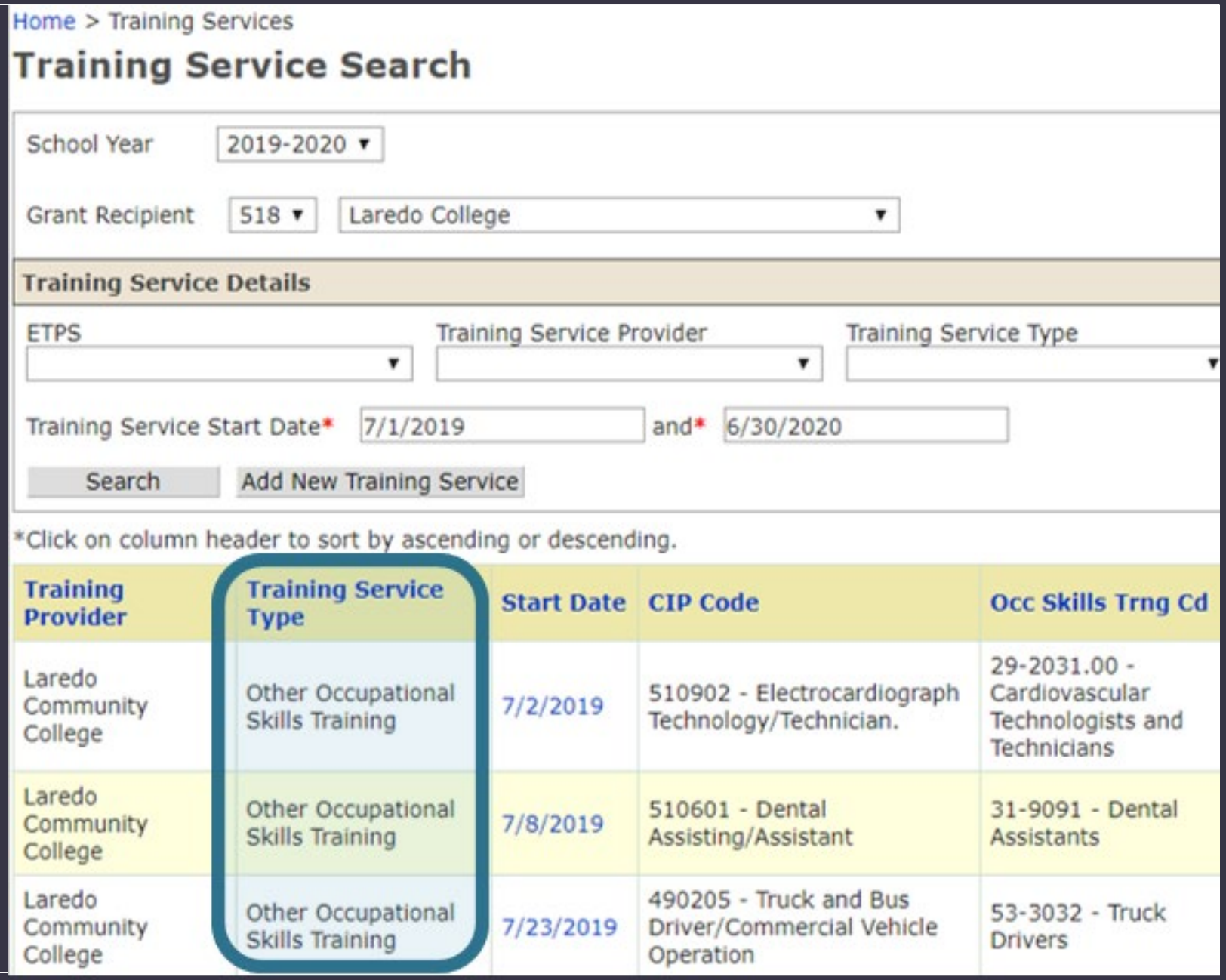
- All participants in IETs are participating in all the components of an IET including training, contextualized instruction and workforce preparation.

- All participants with "completed" training have a corresponding MSG(s) and credential, or are being tracked for a credential.

- Customized or OJT (On the Job Training)as a training service type should not be selected when setting up a Training Service.

Item: Training Services

IETs are most commonly "Occupational Training."



Home > Training Services

Training Service Search

School Year: 2019-2020

Grant Recipient: 518 Laredo College

Training Service Details

ETPS | Training Service Provider | Training Service Type

Training Service Start Date* 7/1/2019 and* 6/30/2020

Search | Add New Training Service

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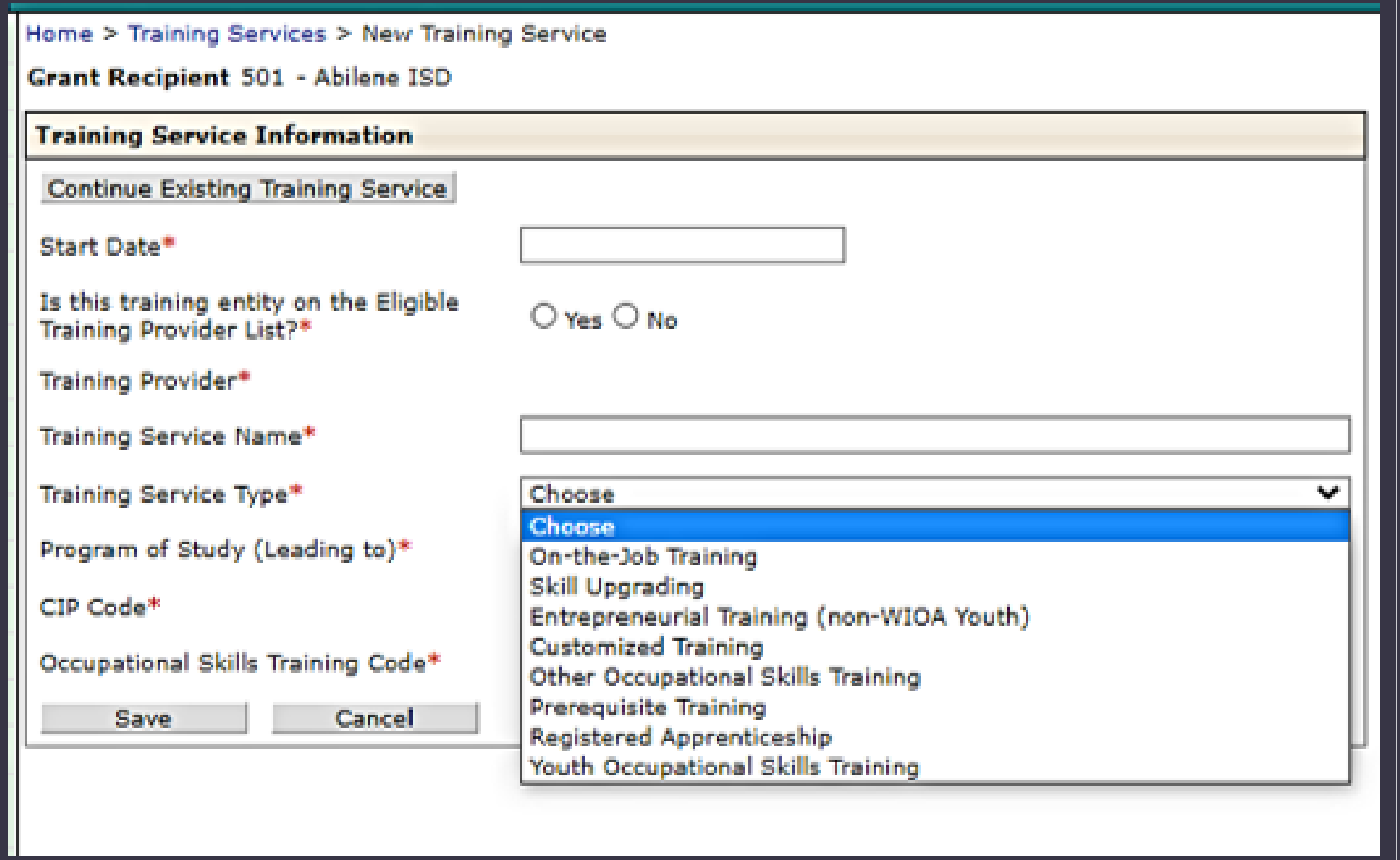
Customized or OJT (On the Job Training)as a training service type should not be selected when setting up a Training Service.



Validation and Data Sign Off

- Validate all classes through June 30th, 2023 by July 15, 2023.
- Run "Non-Validated" report to verify.
- Complete Data Sign Off for 4th Quarter and Final report.
- Ensure all reports are submitted

Grant Management

- Sign off on June Expenditures by July 20th, 2023.
- Reported Obligations are filled out for items purchased in June of PY 22 by July 20, 2023.
- Prior PY21 spending is closed by July 20, 2023.
- Submit Quarter 4 Report by July 31, 2023
- Budget Adjustments for Year 3 (ALAC) and Year 4 (ALAD) are due June 9, 2023.
- Plan SMART Goals for the PY 23-24 Detailed Project Plan.

No Exceptions!

- End of Year for data entry is July 15.
- TEAMS will close on July 15th,

Upcoming Technical Assistance

SAVE THE DATE: Detailed Project Plan and PD Plan Update Roll Out – Thursday, April 27, 2023 @ 10:30 a.m. Register in the PD Portal (No PD Credit. Informational only).

In this session, the TWC Technical Assistance Team and Statewide PD Center will give an overview of changes made to the Detailed Project Plan and PD Plan, deliverables that are required to be submitted annually to TWC. Learn about why these documents are required, how they are used, important dates for these documents and how these documents have been updated to better support overall program success.

SAVE THE DATE: TWC TA Team New Way of Working – Thursday, May 11, 2023 @ 10:30 a.m. Register in the PD Portal (No PD Credit. Informational only).

It's not business as usual for the TWC AEL Technical Assistance team starting July 1, 2023. Join the TWC TEAM as we introduce our New Way of Working which will better equip TWC staff in providing TA to the state, as well as, giving programs the access needed to information more readily.

NEED FURTHER ASSISTANCE?

Program Related Questions –
TWC Program Specialist

Finance / Spending Related Questions –
TWC Grant Manager

TEAMS Related Questions- **TEAMS TA**

PD Related Questions – **PD Specialist**

THANK YOU