Transcript - TWC AEL End of the Year Checklist

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Good afternoon, everybody. Thank you for joining me on our end-of-the-year checklist webinar. So happy that you could be here. My name is Elena Madrid. I'm the supervisor for technical assistance with Texas Workforce Commission AEL. OK, so let's go ahead and get started.

Our agenda for today-- we will be going over the checklist. We'll learn how the checklist is used, who would use it, and the benefits of using it. We'll also learn about any additions or changes to the checklist from last year. So this will be good for anybody that is familiar with this process with the checklist. There have been a few additions and changes, some information added. So it is good that you are here today to get that-- and then also, who to contact for further assistance and clarification.

So the objectives for today will be to understand how the end-of-the-year checklist can specifically benefit your program, because every program is different and the way that you tackle these duties will be very much dependent on who your team is, who you rely on for these types of duties. Everybody works differently. Every organization is different, so learning how this checklist applies more specifically to you and your organization.

Also, be able to tackle the end-of-year closeout duties more efficiently. There are a lot of things when it comes to this checklist. There are a lot of details when it comes to data, when it comes to files, when it comes to staff, so many things.

And if you were to try to keep it in your head, it would just be impossible to remember everything. So we're hoping that this checklist will be beneficial to you, not only in the end-of-the-year checklist, but keeping track of things throughout the year. Doing this thing at the end of the year is so much easier when you've already been working on it.

So the next thing would be come up with a team plan to distribute closeout responsibilities. So again, there's a lot of things on this list. And doing it by yourself is almost an impossible task. You're probably going to miss something. Things will be overlooked. Things will not be thought of, those types of things. So if you have a team kind of staying on top of everything, all of the duties, it just makes things a lot easier.

Also, you will leave better informed than when you started the webinar. That is my biggest goal here is that you don't feel like you didn't learn anything, that it wasn't beneficial. I hope that you can take something away with you. I hope that you're able to use this information, use these tools, and it helps your team overall.

OK, in terms of questions, there may be questions that come up, especially since now you have the end of the year checklist. Some of you have probably already looked over it. And I know you're going to find things, like I don't really understand this, or can you give me more clarification on this, or this would be better explained this way, or I don't know, something.

If you have any questions at all, I'm going to ask you to please put it in the chat. And if you could put your name, that would be great, because sometimes when we write in the chat, we're not always sure what is trying to be communicated. So this just helps us to reach back out to you to follow up with you.

So when we do a document, and we share it with the field, we can make sure that your question was included. So that is what we plan to do. We plan on getting the questions from the chat and then drafting up something that we can turn around and share with you in a future date.

So what is the end of the checklist-- end-of-the-year checklist? It's a tool that is shared by TWC every year to assist programs in their closeout processes. The checklist is not all-inclusive. And you may find that there are some areas or items that could be included but were not. The checklist only serves as a guideline to what should be completed. But programs are welcome to modify the checklist and add items or areas that apply to their organization.

So who would use the checklist? The checklist should be used by any team member who is responsible for any of the items found on the checklist or whose work is related to any of the areas covered. So again, I want to emphasize, it's not all-inclusive. We may have not gotten everything that needs to be on the list on the list. It's a pretty lengthy list to begin with.

So if you feel like there's something that should be added or something that would be more specific to your organization, you're more than welcome to modify it for yourself. And you're more than welcome to use it throughout the year, not just at the end of the year. So please know that you can do that.

The other things to be aware of is, this is not policy. So I want to emphasize that. Sometimes we share things from our department that can be helpful to the organization. Sometimes we're requesting-- we've gotten template requests. We've gotten requests for desk aids or best practices. None of that is policy. And I want to emphasize that.

So this is not something that is officially vetted. It's not an officially vetted TWC document where it means it's gone to our legal process looking for language and all of that kind of thing-- things. So that's really, really important to note. So please, please, please, when you're looking at this document, don't take it like everything in here is set in stone. It's only really to help you to identify things, mainly for the closeout process.

And again, it's not all-inclusive. So there may be some things on here that were missed, but we definitely take your recommendations. If you want to see it added, you think it would be beneficial for the state, please send in your recommendations, and we can add it for next year.

So some things to remember-- sometimes it's difficult to catch everything that needs attention, especially when it comes to data management. So the checklist can make closeout easier and more manageable. The checklist is especially useful for those who are either the quality assurance or program accountability position.

Because there are specific items covered on the checklist, closeout duties are often better tackled as a team. This way, not only one person responsible for getting everything done. The work is distributed amongst several people. Distributing responsibilities often makes most sense when tasks for a specific area, such as staff or training services, as examples, are assigned to those teammates that work directly with those areas, they're sometimes referred to as SMEs, the people that are most familiar with the specific area for your organization.

It may even make sense to have data entry staff paired with these staff to ensure that data is entered correctly, given that the SME would be familiar with the subject matter of the area, and the data entry person is familiar with the capabilities of TEAMS. So I think that sometimes, we forget that, that people that work in TEAMS and are not necessarily in the classroom, they're only responsible for data entry, there's a disconnect sometimes in understanding things like, well, what is a specific funding code that you should use for a particular service when coding students? How do you set up an IET? Why are IETs set up a certain way in TEAMS? So we run into these issues all the time when data entry people are looking to do things in TEAMS, and things aren't necessarily communicated, or they don't necessarily understand the scope of the work that's being done in the organization.

And that's where we find things being misquoted. We have things not set up properly. It's a pretty consistent issue. But if you have your SMEs, for example, your lead instructors or maybe your career navigators is working directly with the data entry people, or your quality assurance people getting in there regularly and making sure that things are set up properly, funding codes are attached properly to participants, you have a better chance of not running into issues in the long run.

Finally, what are the benefits of using the checklists? So as mentioned before, it helps to make the closeout process easier by helping you keep track of some of the details that are needed to be addressed, especially when it comes to data entry. Hopefully, it will also help you to save time for these activities, especially since you will have the list well in advance of closeout, which effectively ends on July 15 of this year.

So the program year ends June 30. But you have until July 15 to get everything closed out. So that's really important. We don't want to wait until June 30 to try to tackle all these things-- you know, you think, well, I have until July 15, if you're a smaller program-- because you're going to find really quickly that you're going to run out of time for things, and you don't want to overlook things or not address things at all.

So other things that you might want to look at is who on your staff could best assist in this process. So who has the experience and knowledge for these different areas that are on this checklist?

And then you may want to also choose who you want as a lead. And why is that important? Because sometimes, when we say, OK, we need to tackle this, some people wait for other people to take the lead, or some people are hesitant to take the lead because they want to make sure everybody is included. Some people just assume that other people are taking care of things.

If you choose a lead, they can make sure that things are completed, timelines are set, and people are being held accountable. And there's one person doing that, because sometimes when you have too many people trying to do everything at one time, then you have the opposite effect of things also not getting done because just too many-- as they say, too many hands in the pot. Maybe that's the wrong analogy, but sometimes when you just have too many people handling things, you don't know who the go-to person is.

OK, so really, really, really important-- the checklist, so important for not missing opportunities for performance. When we're not coding things properly, like MSGs, credentials, employment or entering things like employment enrollment credentials, you can miss the opportunity to get credit for those efforts. So catching all the finer details and making sure data is entered correctly in TEAMS is crucial for this. Once the data closeout programs will no longer be able to access the data for this program year, there will not be any further opportunities to invalidate data or make corrections or changes.

And I can't emphasize this enough. I mean, every year, we have a program that said, well, we didn't get these sign-in sheets in. Or, oh, we miscoded these students, so now we're not getting credit for some IETs. Or, oh, we missed the opportunity to enter some HSE information.

This needs to be completed by July 15 for this program year. I can't emphasize that enough, because you will miss that opportunity, and we will not reopen the data. So please, please, please, pay attention. This is so very important.

OK, so let's get into the actual checklist. So areas covered on the checklist-- so we try to break it down. Some of the stuff might seem a little bit redundant. But there is a reason why we might have emphasized it twice or in a different way, just because we want to make sure that eyes get on it.

So the areas that are covered will be staff, participant classes, training services, validation of data signoff, and grant management. There might be other areas that we probably could include on here. If you have a suggestion, again, please send it to us. And we're more than happy to look at it and see how it could fit into improving the checklist.

So I just want to explain the columns really quick. So on the spreadsheet, you're going to have a column that lets you check off, all right, this item is complete, which is pretty nice because then we don't have to go back to that. That's done.

Then we have the column for the item-- so the actual item that shows, this is what you need to be doing or completing or closing out. The how is how to do that. So for example, entering the professional development hours, some of you may not be familiar with how to do that in TEAMS. And that's why knowing your data entry person is really important.

But it's also important for the SME to be part of this process, Subject Matter Expert, because they're the ones who are collecting the professional development. They have the hours that need to be entered. They may be familiar with the staff that are still needing to get their required PDE in. So the how will actually give you some basic information how to get into TEAMS and where to put that information.

Additional information-- we may include in this column policy or resources or more information related to the specific item, because sometimes you may say, well, why is this important? Or where can I get more information on that? So that's what will be in the additional information column.

We put a column for notes in case you want to put notes in there or you want to type something up. Maybe you need to come back to it, or there's an issue. Something's not allowing you to complete this item, and you can put notes there for yourself or for your team members.

So in the presentation today, I definitely am not going to have time to go over every item. But I want you to be able to help yourselves. So I had mentioned, in the additional information column, it gives you some indication of where to find policy, where to find resources. The resources on this slide are some of the main resources you should be familiar with if you're working in AEL. And I don't just mean the directors. I don't just mean anybody in quality assurance or program accountability. Everybody in AEL should be familiar with this information.

And it's all accessible. It's not something that comes down just to the administrators. It is in a public forum where you can go, and you can access the information. If you do the QR codes, if you scan them, it will take you directly to where this is on the internet. So the AEL letters, scan that code. It'll take you directly there.

The TEAMS report, so this will just take you into logging into TEAMS. You'll have to be able to get into TEAMS to be able to pull the reports yourself.

And then the other area that's really, really important is where you can find the performance guide, testing guide, and AEL guide. So these are all resources team members should be familiar with. And many times, they're referenced in that checklist. So when it's referenced there, you can go and scan this code, and it'll take you directly to that area-- I mean, unless it's already saved on your computer, which is better.

So in staff-- the way that this is going to work, how I'm going to go through it, is, I'm going to take each section. And basically, everything-- the items that are covered in the section will be listed on the slide. But what I've highlighted are some key areas that I want you to pay attention to.

The ones highlighted in red will be things that are new to the checklist, or additional information has been added for that item. That's important for you to look at.

What's underlined is just areas that, for my sake, I need to remember to bring some attention to. There were items that were already on the checklist, but maybe there's something I feel like I need to communicate with you.

So again, all these items are on the checklist. You can go to the checklist, and then it'll give you the additional information that you need. So I'm not going to go over every single one in detail.

So the first thing I want to talk about is all staff meet required PD. Now, what was added to this-- very important to know-- is we didn't emphasize on the checklist last year that if a staff member does not meet the required PD, then they need to have a staff exemption submitted for them. And it needs to be approved. Unless it's approved, that individual-- and I'm talking a little bit slower here because I don't want to rush through it-- that individual should not be attached to a class. It shouldn't be like, oh, they missed their PD, but we're just going to attach them to a class and submit an exemption for them because we know it's going to get approved.

Well, we're getting a little bit more strict on these exemptions because we're finding, for some programs, some of their staff are having multiple staff exemptions submitted for them multiple years in a row. And that's not something that we want to encourage. An exemption is OK. Yeah, we understand, first year maybe some-- whatever reason, you didn't complete your PD. Or maybe your PD coordinator wasn't staying on top of the PD that needed to be completed. So that's a whole different discussion.

What are the cases-- if a person does not meet their PD, the process is they need to submit a staff exemption. And that staff exemption needs to be approved. Unless it's approved, that individual should not be working in or teaching in a class because they're getting paid through grant funds, but they are out of compliance. So just want to emphasize that for that. And it is noted in the checklist. this year.

What we have highlighted here, TEAMS user access account has been removed for staff that are no longer employed. This was also on the checklist, but I think I added something to this. What's really important about this, you have to understand that there's a difference between having a staff profile and TEAMS access. Those are two different things.

So in the profile, the profile will always stay in TEAMS. But you have to go into TEAMS and revoke user access because a person can still go in there after they're no longer working with you because they still have access to TEAMS, and they can look at data. They can have the same permissions they had before unless you make the request from us to have their TEAMS access removed. So that's very, very important to emphasize and not to forget.

The annual DocuSign P-41 agreement and cybersecurity submissions complete-- now, those documents are good for up to a year from the time it was completed. But if it lapses, if you go beyond your deadline to renew that, your TEAMS access will be revoked.

So letting you know, you may be someone that goes in there quite frequently, or maybe you don't go in there very much. But on the occasion that you do go in there, you want to have access. If you're not completing those documents and submitting them, then your access will be revoked, and you have to go through the process again of getting access. So just making you aware of that.

Determine PD for program year '23/'24 in the PD plan. This is something new that was added. For those of you who are working with the PD specialists, the PD coordinators, other people that are working in PD, you're familiar with this change. So the PD plan for the new program year is now going to be due June 30. Now, why is that important? Because if you are planning for a new program year, you should have your plan in place before the new program year starts.

What we had before was it being submitted after the program year started, which really doesn't make sense because you shouldn't be doing your planning after the program year started. You should already have a good plan for the new program year. So that's part of what has developed with PD, and it has been added to the checklist.

OK, so I'm not going to have time to give examples and screenshots of everything. But I wanted to bring a couple of images up just so people who aren't familiar with this or who aren't regularly checking on things but who are curious-- maybe it's a director who doesn't always check on PD for their staff but now would like to know. There's a staff roster report that you can pull. And this is where you would check to see how many hours are accrued for your staff for professional development.

And then also, the other thing that was mentioned-- oh, I didn't mention, but it's in there. Putting end dates for staff-- this is really, really important. So sometimes when the organization is really large, you're not always aware of the turnover that happens with your subrecipients But subrecipients, you should know that when your staff leave, when they're no longer employed with you, then there should be an end date put into their profile.

What happens sometimes is the program year closes, and let's say a person had left the job in May. The program year closes, and now it's the new program year, and they're like, oh, we need to put that end date for May-- well, you can no longer do that because the program is closed. And now you have to put an end date of July 1st.

But how does that impact you? Well, now it looks like that person was still employed from May to July. And you could potentially-- things get looked at like, well, why didn't they meet their PD, and this and that. And then you have to go into the whole conversation of, well, they actually left in May. But we couldn't put an end date until July because we didn't meet the deadline.

So please remember to do that. It's really important. And again, when they leave, you need to let us know that they're no longer with you anymore either so that we can remove their TEAMS access.

So this is how you put in the end date. You go into their profile. You select the editing function. You go ahead and enter it. You press Edit. And then the new end date will show up on their profile.

All right, so now we're moving into participants. A couple of things here-- evaluate TEAMS data for potential funding-- coding issues. And then we have a couple of things related to that. A new thing that was added, all intensive service class participants are coded with the appropriate activity funding code. And then also, all IETs or Integrated EL Civics participants are coded with the appropriate funding codes. So you might read this and think, well, this is kind of the same thing, isn't it, if we're checking for funding codes?

Well, yeah, it is. I mean, you would be using the same report. And I'm going to show you which report next. But what needs to be emphasized here is that when you're running the report, you can pull for a specific group of individuals. For Intensive Service 6, for example, you would choose just the funding codes related to intensive services. And those are the participants that you could look at to make sure that they're coded properly.

Also the same with the IET students. And the reason why we separated them out is so that you're not skipping over anything, because sometimes if you just run the report, you may not be looking specifically to see, oh, are IET people coded correctly or intensive service people are coded correctly. For new people that are new to the checklists and TEAMS and all of those types of things, you get credit for how you code your participants. So when we run reports and all of those things, and you're looking to see, what is my participant count for anything-- for general enrollment, for IETs, for anything, any services-- it's all dependent on how you coded the participants in the classes.

So if you're not coding correctly, if you're not capturing that, that could possibly be a missed opportunity for performance. Again, you don't want to run into the end of the year and realize, oh, wow, we didn't code, like, 50 people with the IET funding codes. And so now we didn't get credit for that.

So this should be checked throughout the year. Really, it should be checked before every data validation, just to stay on top of things as kind of like a quality assurance process, and then most definitely before the year closes out.

So how to use the report, or where to find the report-- so some of you who aren't using this regularly, aren't familiar with it, I suggest that you start getting familiar with it. It's a very important report. This is the only report that will tell you how people are coded.

So you would have to do a report search because it's not included in the dropdown on reports. Do a report search. Just type in "funding," and you will get this report option participant count and hours by funding source, site, and class. Again, under funding source, you can select for what specific funding codes you want to see if people are being coded correctly. Are we getting all the participants that we think we have coded with the correct funding codes?

And then a report will be generated. You need to make sure you select with subreport, though, so that you can get the hyperlink in the participant count column, where you can click on it, and you can get the actual participant names. So where you see funding source on the left side, it says basic AEL AEFLA. That is the funding code that is being used to code all the participants that you can see. Or in the participant count, they're being coded with that funding code.

The same would be-- it would be the same if you had went ahead and ran it for IET or something. You would see the funding code IET AEFLA, IETs EL6, or whatever you select. And then you can see the classes that those funding codes show up in and the participants that are attached to it, so really, really important report to be familiar with.

All right, just want to mention this. And it was in the slide earlier about doing file checks. Do spot checks. That's very important, because monitoring is going to go in, and they're going to want to see that you have all of the paperwork for a student or participant that should be in their file.

So you should have their enrollment form. You should have their agreement to share information. You should have their testing instruments. You should have their I check plan, all of those things.

On the checklist, it does list the different items that should be in the file. And those are basic things. Those are the things that monitoring will be looking for. You may include other things on there. That is a local decision to do. But there are specific things that should be in that fall as a quality assurance check.

It's a good idea to pull a couple of files once in a while, random files. Go in. Don't let anybody know or expect that you're going to be pulling those files, because they may try to run and fill things in sometimes to make the files look good.

But just go and do a random check. Grab five files. Use the monitoring tools we have to see if everything's in there. And do that throughout the year. Don't wait till the end of the year.

OK, we're still on participants. There's a lot of information when it comes to participants. So here, individual participating in IET intensive services or distance learning have reached participant status for 12 direct hours. This is something every year, we see this happen. We see people in these services that never get 12 direct hours. So maybe they started in an IET, and they didn't finish. So that's one situation.

The other situation is we have people not get 12 hours, but they have a lot of training hours. So that tells me they spent time in training. So let's say they do 75 hours in training. And the idea is, OK, now they got their certification. They completed an IET.

Well, for performance purposes, you didn't get credit for that person because they didn't get 12 direct hours. So let's say they got 5 direct hours, but they did 75 hours of training. That's a missed opportunity again. So we need to pull the reports, and we need to look at those individuals that are coded with those funding codes. Are they getting the direct hours and the training hours? Very, very important, not just the training hours.

Test participants will have tests set to expire. So this is important because if their test expires, if they don't have a valid test, you cannot enroll them into a class. So if their test expires, let's say right before the program year ends, and then you try to put them into a class the next year, you're not going to be able to do that because they need a test that makes them eligible to be enrolled into a class.

So some of you may have experienced this, or sometimes you run into it, and you're not totally understanding why that's happening. Why can't I put this person to a class? You want to look at whether their test scores have expired-- really, really important.

This is really important. [LAUGHS] I think everything on here is really important. But I'm trying to get things that sometimes you just aren't aware of, or you didn't understand how TEAMS works, so you may miss opportunities unintentionally.

So here's a perfect example. And I try to simplify this as much as possible for people to really grasp. When students go into the new program year, when you have a participant going from one year to the next, they need a baseline. There's two ways to establish a baseline.

The first way-- and they both have to be with valid tests. The first way is for a valid test that has not expired to carry over with the student to the new program year, and that becomes their baseline.

The way that happens is they have to be put into a class and get direct hours. That test will carry forward with them because the test is still valid, and TEAMS recognizes that as a test that makes them eligible to be put into a class in the new program year. So the test after that will be a post-test. And you can see that at the top.

The second option-- not the best option, especially if you're trying to get MSGs or gains with your students with post-testing, or if you're in the habit of just getting people-- retesting everybody at the beginning of the year. I'll tell you why that's not a good habit. If you have a valid test, and you test them again in the new program year before getting them a direct contact hour, putting them into a class, entering that into TEAMS, you have now established a new baseline with the new test-- not a progress test, a new baseline. So that means you're going to have to wait to get accumulated hours for that individual again, 40 to 60 hours, whatever it is. And then you can progress test them again.

So I hope you can see the difference. I hope this diagram is simple enough so that you can understand why you probably wouldn't want to retest everybody at the beginning of the year, especially if they have a valid test that could carry over, because what you're doing is you're establishing a new baseline for them. And you're going to have to wait another 40 to 60 hours to make progress.

Because sometimes people think, oh, we're progress testing them, because they had a test at the end of the program year. They're coming back. We want to give them a-- we think it's going to be a progress test. But that's not what it is. It's a new baseline because you have not put them into a class yet to get a direct hour to pull that original test forward.

So I hope-- if this doesn't make sense to you, please, please, reach out to the program specialist that you work with. And we're more than happy to go over that with you again, because this happens sometimes with programs. And they're not understanding why they didn't make a post-test gain with a test in the new program year.

OK, participant-- there's not anything new added at the end here for participants. The planned GAP, we do want to emphasize using because it's not used enough. We have plenty of students that will be coming back to services.

Sometimes they have to leave, whether they're doing migrant farm work. Maybe they have a family emergency. Maybe they have a medical situation. We don't want them to be exited, because once they're exited, you're starting all over again with establishing them as a participant.

So there is information in the checklist that tells you where to reference more information on planned GAPs if you're not familiar with them. It's going to be in the AEL performance guide on page 14. And there's a good explanation of how to use a planned GAP and what it is.

OK, I think back here at the top, as mentioned, employment outcomes, educational outcomes, and career and service details being captured in TEAMS. That is a lot of things that we're asking for participants. But know that you have a place to enter them in TEAMS. And if you go to a student profile, you'll see at the very top, you can see educational outcomes, career and training services, employment outcomes. Those are all areas where you can input the required information for individuals or for participants.

All right, on to classes-- so classes, there hasn't been a lot of new information shared or anything that is really jumping out at me that says we need to go over this in detail. But please know that this stuff is on the checklist. And there's additional information for it.

In terms of training services, what you do need to know is, if you have classes that are part of an IET, whether they be training or contextualized, they need to be attached to a training service. Really, really important to know, too, that training services are not the same as training classes. So even though you set up a class for training where you're recording training hours, that is not the same as a training service. You still need to attach it to the training service. So if you click on training service, you should be able to see all the training services that have been set up for your organization.

And when you click on a specific training service, you'll then be able to see the classes that are attached to the training service. So if you see assigned class in those training services, those are all classes that have been manually-- you have to attach them. They don't just show up automatically. You have to add them to the training service.

That's important for you to get credit for your IETs, because even though a person may be getting training hours, that's not enough for you to get credit for an IET at the federal level. They still need to show to be attached to training services.

OK, going back to checking training hours for our IET participants, so it's the same as what we had shared before. But it's something we don't want you to overlook. It's required.

So I talked a little bit about people in IETs not getting enough direct hours. But the case is also true where sometimes the training hours aren't being recorded. So you have people in an IET getting plenty of direct hours, sometimes proxy hours, even, but no training hours are being recorded. So you want to make sure that you check for that information.

When you want to kind of compare how many hours people are getting side by side, you can use the POP report. That will show you training hours, direct hours, and proxy hours that a student has been recorded with, so very good report to pull. It makes it a little bit easier when you're trying to do a side-by-side comparison. OK, we see that this person was in IET, but they're only getting 3 direct hours and 140 training hours. So we need to make sure that that person gets their hours.

All right, something else that was included last year-- and just a general reminder. No classes will be rolling over. So that means you need to put end dates to your classes. Really, really important to emphasize that when you set up a class in TEAMS, if it is a face-to-face class, most specifically, however that class is starting and ending in the field needs to be reflected in TEAMS. We see a lot of times, classes being started in let's say, July 1st. But activity actually doesn't start for the students until August.

That can't happen, because it looks like a class has been open for a month or two months. We think a teacher is getting paid, but for no activity. So please, please, please, make sure that your classes reflect when they're happening, that the start and end dates show when students are actually in the class, and they're participating.

Training services can continue. We have situations where training crosses over into a new program year. So if you set up a training service, then it will continue. Even though you end the class at the end of the program year-- let's say you have Welding 101, and it runs between May and August. I'm just giving a general example here.

Well, in TEAMS, that class has to end. The class-- not the training service-- the class has to end June 30. And then it restarts in the new program year on July 1st. So it looks like it's ending, but it's not. It's really continuing because there's no space or time between the end of one date and the start of another date.

OK, training service-- so working into training services, pretty much same as what we had last year for some of this section. Just a reminder, the training services are different from training classes. If you're not familiar with this, and you need a little bit more understanding, please reach out to your program specialist so that we can walk you through that and how to set up training services.

Training services need to be updated also to show when students are completed or withdrawn. So if you have participants in your training services or classes attached to these training services, it needs to show that a person completed or withdrew from the training service.

So the way that is done is when you go into the training service, you'll see your participants listed, all the participants that are attached to the training service because of the class that was attached to the training service. You'll see a function or an action to edit where you can either put in "withdrew" or "completed" and the date of that action.

And then you'll see that it'll show up for you, whether they withdrew or completed. And there is no report for this. I'll tell you right now, I know someone out there is like, is there a report we can pull to see this? No, there is not. You will have to go into the training services and see what the status is.

OK, training services, a little bit more information. Two new items that were added-- all participants in IETs are participating in all the components of an IET, including training, contextualized instruction, and workforce preparation. Now, I know that you all who have been with AEL since we started this, really, know you can name those components by heart. Are they actually happening? Not always.

So sometimes we have situations where maybe there's a contextualized instruction class that was started or a onboarding class or a bridge class, whatever you want to call it. So they're getting direct hours, and that's all they're getting in the program year. Or we can see that sometimes happen at the end of the program year, which is understandable. But it doesn't really make sense when it's early on in the program year, and that's all the student got, and then there was no training associated, there was nothing else that would show that to be an actual IET. So really important that it is reflected in TEAMS, and if you're claiming to do an IET, that those components are showing up with classes and hours.

This is another thing that was added that's really important. Customized or on-the-job training as a training service type should not be selected when setting up a training service, because it will exclude those participants from being in the denominator for the credential measure, so choosing these options should only occur when our program is working with a board program or doing a deliberate co-enrollment for a training.

So it may have happened that you've selected customized training for something or on-the-job training. But just know that this is keeping them out of the credential measure. That means they will never be counted in the denominator, and this might be affecting why you think that you should have more credential outcomes, but you're not. You may want to look into this and see if some of your training services, the training service type was selected for these options.

So let me see, OK. So in the training service type, when you go into training services, you can see what was selected for each training service. So in these cases, you can see other occupational skills training, which is what we commonly encourage you to select. You should select this when you're setting up your training services.

Where that happens is in the training service setup. So when you go to training service type, you will have a dropdown that gives you a number of options. So we should be choosing other occupational skills training and not the customized training or on-the-job training unless it's a very, very special case. So if you weren't aware of that, know that this is affecting-- this can affect credential outcomes if you select those options.

OK, we're almost getting there. And we're almost close to time. Validation and data signoff, not much new here. Those who do this process are familiar with it, making sure that data is validated, make sure that you do the signoff.

This year-- and I took off this. I should have taken this off in the PowerPoint. I apologize. We're not going to have a final-- oh, well, we were, actually. In TEAMS-- sorry-- when you do the data sign-off, you are going to be doing the fourth quarter data sign-off. And then also the final-- there's a final one that you have to do. And then also ensuring all reports are submitted.

All right, last section on the checklist-- there are a couple of changes here in terms of a little bit of changes of deadlines. Oh, I thought I took this off. OK, this, I thought I updated. I apologize.

But in the checklist, everything on the checklist is updated. One thing that is included that we want to encourage you is planning your SMART goals for the detailed project plan.

So the detailed project plan will be really different moving forward. There's a lot of changes to it. That information will be provided in the next webinar. I don't want to give out too much information. Just know that it's not going to look anything like it did before.

Hopefully, it'll be a lot more user friendly. Hopefully, it'll make more sense in helping with reporting on what's going on with your program. So I just wanted to share that.

All right, last and final reminder-- end-of-year data entry needs to be complete by July 15. TEAMS will close July 15 at the end of the day. Well, usually, they'll close the day after. So you have the full day to complete your July 15 data entry, anything that you need to add or change, modify, that type of thing. There will be no exceptions to reopen the data once it is closed.

A couple of last announcements-- upcoming technical assistance, so save the date. Again, we will be changing the detailed project plan. And we will have a timeline for it.

We also have some changes to the PD plan. We are doing a better alignment of these two deliverables. And we want to share that information with you so that you're prepared going into the new program year, and you understand why the changes were made.

The other thing that's really important is the new way of working-- TWC TA, new way of working. We have a couple of new tools that we want to share, also how we're modifying our practices to get a better reach across the state. That will be happening May 11. So I hope that you register for that.

They're both available in the PD portal now. So that you don't forget, I highly encourage that you just run over there and get your name in on the list.

So with that, thank you so much. If you need further assistance, this is who you will reach out to. So the checklist covers a lot of different areas. If it's something program-related, reach out to your program specialist. If it's something finance or spending, budget-related, your TWC grant manager.

If it's TEAMS related, you're just having some difficulty with TEAMS, you need to get access to TEAMS, any of those technical things, reach out to TEAMS technical assistance for assistance. And then if it's PD related, please reach out to your PD specialist.

And when you're going through the checklist, more questions will probably come up for you. So we're expecting you to reach out to us. And we're more than happy to assist.

SPEAKER

All right, we're getting some great info, some thank yous, that this is a great tool, super helpful. So thank you, Elena.

ELENA MADRID

Oh, I'm sorry, but I want to thank my team, because between everybody, we all helped with updating these documents every year because there is a lot of information. And this wouldn't happen with everybody's help. So I really feel it's important that if you don't have a good solid team in your organization, that you work on that, because it does make the workload easier. And you are able to catch things that need to be taken care of. So I really want to thank my team for that.

SPEAKER

All right, Elena. I think-- thank you, everyone, for participating. But I think we're done. So thank you very much.

ELENA MADRID

All right, thank you.