

TEAMS 5.6 | Release Date 03.19.2021

DISABLE THE "ADD NEW PARTICIPANT" BUTTON UNTIL SEARCH IS CONDUCTED

Purpose

Users creating duplicate participant records has been an ongoing problem in TEAMS and has come up in the Texas Workforce Commission internal audits. To address this problem, we've created a three-pronged approach.

- Disable the "Add as New Participant" button until the user has done a search Using First/Last Name and Date of Birth (DOB).
- Data fix to merge as many of the participant records as we can up front.
- Add a merge participant records feature to TEAMS.

This change may require some training and procedural changes locally to ensure when staff are looking up students in TEAMS, they have their DOB, Participant ID, or Other Document Number available.

New Profile Elements

The add New Participant button has been disabled until search is complete. The participant search results has been revamped to include additional student identifiers to help determine the best selection of existing students in the system.

If you do not know the student's Date of Birth (DOB), but they have indicated being in your program previously, you can utilize the period of participation (POP) report to get this information.

Home > Participant > Participant Search

TEAMS Home

Reports

Report Search

Admin

Grant Recipients

Statewide List of Providers

Assign Provider to Grant Recipient

Sites

Staff

Staff Development

State Trainers

Classes

Training Services

Participants

Home > Participants

Participant Search

↓ Press down arrow to enable autocomplete on Last Name, First Name, Middle Name, and City.

Participant Information

Last Name	First Name	Middle Name	Date of Birth (mm/dd/yyyy)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Document Number	Participant ID	City	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Search

Add New Participant

Business Rules

We modified the following fields below to the 'Participant Search' in the following order.

1. Participant must search combination of required elements to generate a response. If the user tries to search for a participant in any combination other than those listed below, user will receive notification "(You must search by Last Name + First Name + Date of Birth together or Participant ID or Other Document Number. Middle Initial and City are optional search criteria)". In essence, the user can search by the following combinations:
 - a. **Last Name + First Name + Date of Birth**
 - i. Optional: Middle Initial and/or City
 - b. **Or, Participant ID**
 - i. Optional: Middle Initial and/or City
 - c. **Or, Other Document Number**
 - i. Optional: Middle Initial and/or City

[Home](#) > Participants

Participant Search

↓ Press down arrow to enable autocomplete on Last Name, First Name, Middle Name, and City.

Participant Information			
Last Name	First Name	Middle Name	Date of Birth (mm/dd/yyyy)
<input type="text" value="casillas"/>	<input type="text" value="iker"/>	<input type="text"/>	<input type="text"/>
Other Document Number	Participant ID	City	
<input type="text"/>	<input type="text"/>	<input type="text"/>	

Search

• You must search by Last Name + First Name + Date of Birth together OR Participant ID OR Other Document Number. Middle Initial and City are optional search criteria.

2. Display the search results below in ascending order by Last Name, First Name, Date of Birth, and City below the following read-only columns.
 - a. **Participant ID**
 - b. **SSN**
 - c. **Last Name**
 - d. **First Name**
 - e. **Middle Name**
 - f. **Date of Birth**
 - g. **Driver's License/State ID Type**
 - h. **Driver's License/State ID Number**
 - i. **Identity Document Used**
 - j. **Identity Document Number**
 - k. **Other Document Type**
 - l. **Other Document Number**
 - m. **Street Address**
 - n. **City, State, Zip Code**
 - o. **Merged**

- Prior to this fix, if there is only one participant match, TEAMS would automatically open the Participant page for that participant. With the edit, you will still have to select the participant to take you to the participant's page.

Home > Participants

Participant Search

↓ Press down arrow to enable autocomplete on Last Name, First Name, Middle Name, and City.

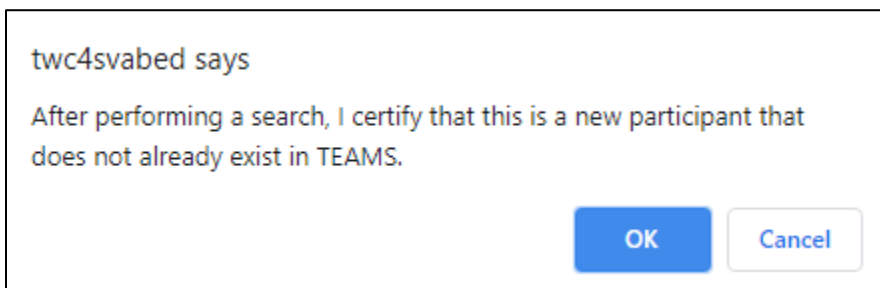
Participant Information

Last Name First Name Middle Name Date of Birth (mm/dd/yyyy)

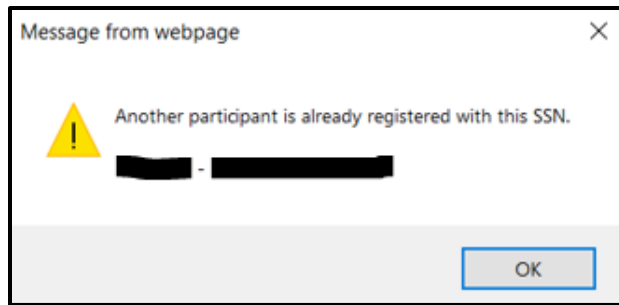
Other Document Number Participant ID City

Participant ID	SSN	Last Name	First Name	Middle Name	Date of Birth	Driver's License/State ID Type	Driver's License/State ID Number	Identity Document Used	Identity Document Number	Other Document Type	Other Document Number	Street Address	City	State	Zip Code
2178329	(None)	Casillas	Iker		5/4/1968			Public assistance/social service records	ABC123				Austin	TX	78746

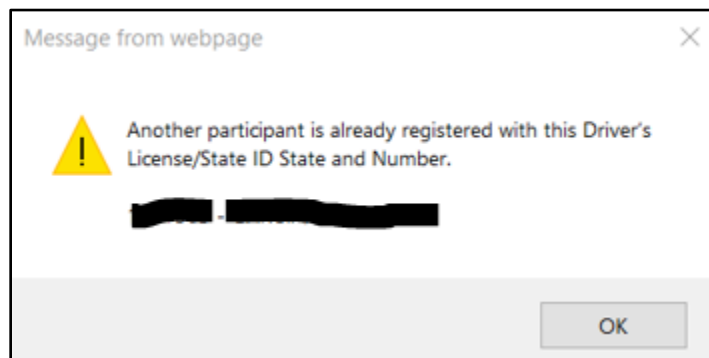
- If the user determines that none of the search results match his/her participant, allow the user to click on the Add New Participant button. When the Add New Participant button is clicked on, display the message, "After performing a search, I certify that this is a new participant that does not already exist in TEAMS" and allow the user to select the OK button or the Cancel button.



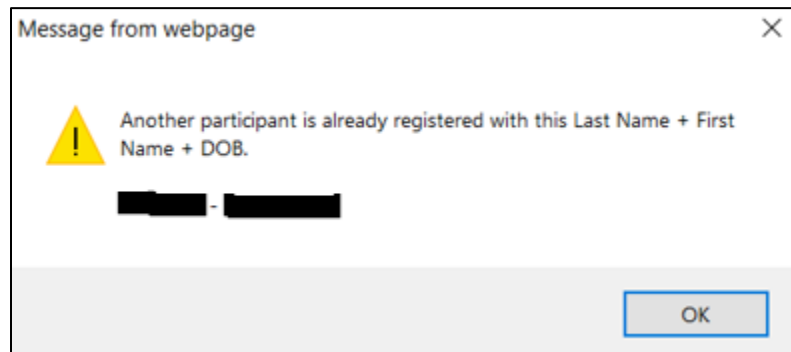
- Participant Already Exist With Same Information
 - User will receive the following message to include (Participant ID, Last Name, First Name), "Another participant is already registered with this SSN (Participant ID, Last Name, First Name)".
 - This message is an edit that prevents a save.
 - This message is only displayed when the user is attempting to save a new or modified SSN.



- b. If the user tries to save a participant record with a Driver's License or State ID with the same State and Number as an existing participant record, display the message, "Another participant is already registered with this Driver's License/State ID and Number. (Participant ID, Last Name, First Name)".
 - i. This message is an edit that prevents a save.
 - ii. This message is only displayed when the user is attempting to save a new or modified Driver's License/State ID and Number.



- c. If the user tries to save a participant record with the same Last Name + First Name + Date of Birth as an existing participant record, display the message "Another participant is already registered with this Last Name + First Name + Date of Birth. (Participant ID, Last Name, First Name)".
 - i. This is a warning message only and does not prevent a save.
 - 1) Note: It is entirely possible that two or more participants share Last Name + First Name + Date of Birth.
 - ii. This message should be displayed when the user is attempting to save a new or modified Last Name and/or First Name and/or Date of Birth only.



FIX EXCEPTION ERROR WHEN UTILIZING PARTICIPANT FILTERS

Purpose

TEAMS was throwing an exception error when users tried to filter certain reports by participant profile variables. The exception error has been fixed.

Reports > Participant > Period of Participation > Participant > Profile Variables

The screenshot displays the TEAMS interface. At the top left is the Texas Workforce Commission logo. The top right shows the user 'BLANCA SALDIVAR (Administrator)' with links for 'My Profile' and 'Logout'. The main header is 'Texas Educating Adults Management System' with 'TEAMS' below it. A breadcrumb trail reads 'Home > Reports > Report Parameters'. The left sidebar contains a navigation menu with items like 'TEAMS Home', 'Reports', 'Report Search', 'Admin', 'Grant Recipients', 'Statewide List of Providers', 'Assign Provider to Grant Recipient', 'Sites', 'Staff', 'Staff Development', 'State Trainers', 'Classes', 'Training Services', 'Participants', 'Summary', 'Reporting Year Locks', 'Waiting List', 'Data Match And Survey', and 'Help'. The 'Reports' menu item is highlighted in yellow. The main content area is titled 'Periods of Participation' and includes buttons for 'Run Report Summary', 'Run Report Extract', and 'View Report Description'. Below this is a 'Filter' section with 'Start Date*' (02/01/2021) and 'End Date*' (03/18/2021) fields, and a 'Grant Recipient*' dropdown menu showing '501' and 'Abilene ISD'. The 'Funding Source*' section has a 'Select All' checkbox and several checked options: 'Basic AEL (AEFLA)', 'Basic AEL (Corrections)', 'IET (AEFLA)', 'Work Based (AEFLA)', 'Transitions Classes (AELFA)', 'ESL for Professionals (AEFLA)', 'IET (EL Civics)', 'EL Civics (EL Civics)', and 'Re-Entry (Corrections)'. The 'Providers, Site & Classes' section has a 'Participant' dropdown menu highlighted in yellow. Below this are 'Employment' (dropdown), 'Age From' and 'Age To' (text boxes), 'Distance Learner Type' (radio buttons for All, Non-Distance Learner, Distance Learner, Participants with Proxy Hours), and 'Training Hours Type' (radio buttons for All, Participant without Training Hours, Participants with Training Hours). At the bottom are 'Profile Variables' and 'Goals' dropdown menus.