TEAMS Version 3.8

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Hello everybody, this is Carrie Tupa with the Texas Workforce Commission and I'm very excited to announce the release of TEAMS version 3.8. Which is the first of our TEAMS releases that contains the period of participation.

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Depending on when you are watching this webinar, this version may have already been released or about to be released. TEAMS version 3.8 will be released over the weekend and be available early Monday October 22nd. TEAMS will be down most of the weekend prior, beginning at 6pm on Friday October 19th. This is because we anticipate that the release and information contained in the release will take most of the weekend to get pushed into our live TEAM system. We don't have an exact time that the release will be finished running, however we do anticipate that TEAMS will be back up and running on Monday October 22 in the morning.

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So let's talk a little bit about what is new in version 3.8. First and most excitingly, TEAMS now calculates an individual's period of participation start and end date. Important is also to note that mostly connects us to the period of participation start and end dates, the planned gaps functionality that is currently in TEAMS has been modified to align the period of participation start and end date functionality. And finally the participant ID is now on the participant screen. And we'll talk a little bit about what each of these means in the coming slides.

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So let's talk first about how planned gaps have been updated in TEAMS. First just to review what a planned gap is, a planned gap is a way that participants who have not received a qualifying service for 90 days are prevented from exiting. So the way periods of participation works is that once an individual goes 90 days without a qualifying service, they exit automatically. Entering a planned gap and service into TEAMS reflects the participant's commitment to continue enrollment and prevent automatic exit from the program and entrance into the denominator for exit based measures. For those of you that have been attending the Regional Accountability events, you've heard a lot about the planned gap and how the planned gap and exit affects performance. So the planned gap is a way for you to indicate that an individual has not actually left your program, but has a leave for a variety of reasons and will be coming back into your program.

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So the big thing that is new with planned gaps and how gaps get entered into TEAMS is that planned gaps must now be entered in month long increments and updated each month.

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So if you’re asking yourself why is this? Well first off this aligns planned gaps functionalities to other TWC systems and the way other TWC systems require that planned gaps be entered. But also it prevents unintentional exit in the instance that a planned gap period is either overlapped with the service or an individual doesn’t necessarily return when expected from a planned gap. And for those of you that attended the summer institute, I went into this a little bit. But essentially one of the most complicated pieces of the period of participation in our calculation of the period of participation was with how the planned gaps work and how the planned gaps affected all of this. And our resolution for a variety of challenges that were occurring in the calculation was to utilize the functionality that other TWC system utilize and requiring that planned gaps be updated monthly. But beyond the technical reasons, the more important reason is that it gives you an opportunity to check in with a participant and verify when the participant will actually be returning to services, that the participant is returning to services for purposes of continuing in your program.

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So in terms of entering a planned gap, the basic process of entering a planned gap is the same. From the participant screen, you select ‘add a planned gap or service’ or ‘add a gap of service’ and you add a start date and an end date. However the gap end date cannot be in a new month. So in this example here on the screen, I tried to enter a start and end date that are not in the same month and the system will not allow me to do that because again, I need to enter a new part of the planned gap every single month. Another important piece of information is that an individual must be a participant, meaning they have 12 direct contact hours in their period of participation and have a current year profile in order for you to be able to enter a planned gap service. You cannot enter a planned gap service for an individual who is not yet become a participant.

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Other important information you need to know about planned gaps is that if you add what’s called a qualifying service during a planned gap, the planned gap date will be updated in TEAMS. Some examples of qualifying services are: direct contact hours, proxy contract hours, training contact hours as is outlined in AEL 0118 change 1, so this deals with how long you can have training hours in isolation, any test that is not a high school equivalency test and any career service that is not orientation. So again, these are qualifying services. These are services that continue a period of participation and as such, if you try to enter one of these services, during a planned gap, the planned gap date will be updated to be the day before this particular qualifying service.

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So really quickly before I go into an example, I want to clarify some terminology, and what I have on the screen here is what we call planned gap versus capital p planned gap.

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So as you’ve heard me mention, a planned gap, and if we go back, a planned gap needs to be at least 90 days. Because if a planned gap is not 90 days, there’s no point in having a planned gap.

The participants won't have exited. There's no need for an actual planned gap, however if you also heard me say, planned gaps must be entered in month long increments. Meaning when you actually enter the planned gap into the system, it will be less than 90 days until you've reached the point of having enough information in the system for the planned gap to be 90 days.

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So when we talk about entering planned gaps into TEAMS, I like to use the concept of planned gaps versus capital P planned gaps. Meaning planned gaps that I enter into TEAMS in those month long increments versus a Planned Gap that is actually 90 or more days. So for the purposes of entering into teams every time you add that month long chunk, we still call it a planned gap but for the purposes of policy a planned gap doesn't really matter until its 90 days. Because otherwise the participant would not have exited anyways so there's no need for a planned gap to actually be entered. Planned Gaps and planned gaps for the purposes of data entry, are essentially treated the same in TEAMS in terms of not being able to overlap with qualifying services. A lot of this information that I'm covering right now, again related to planned gaps and what planned gaps do is again covered in those regional accountability events which is like very important that someone from your organization attend these events.

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So let's look at an example here. So this participant we have has a planned gap, a lower case planned gap from 8/1 to 8/31. So again they haven't reached that 90 day period but we're entering this into month long chunks. This is the first section of that planned gap.

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I then go in and try to contact hours during the planned gap again currently scheduled from 8/1-8/31. On 8/15, I try to add 10 contact hours.

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The system will now tell me that this individual has an opened planned gap in this time period and that any contact hours I add are going to change the planned gap in service to the day before the contact hours. If you hit the continue button, in this instance that planned gap that you added is going to be updated to actually end the day before the service that you added. If you hit cancel, you can actually modify the data that you just tried to enter.

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So let's say for example you didn't mean to enter this 10 hours on this row, you meant to add it down here, hitting cancel will ensure that you don't interrupt that particular planned gap in service. If you have multiple participants in a class that has a planned gap during when you are trying to add contact hours, so let's say on the 15th of August, you have multiple individuals and these individuals all have planned gaps, this little message that you receive will say 1 of however many planned gap issues you have, and you will need to go through each of those to verify that you understand that if you update these particular days of data entry, the planned gap for those individuals will be updated. And again, this allows you to recognize that the planned gap essentially ends when a service interrupts that planned gap.

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A similar notice appears if you try to add a test or a career service other than orientation during an existing planned gap. So again if you try to add a service during a point when you told the system that this participant will not be a participant, you will receive this message. If you hit continue its fine, it will just update the end date of the planned gap. Otherwise you can go back if you've made a mistake and fix the information.

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So let's talk a little bit about the second changes.

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This has to do with the participant ID. So the participant ID is essentially the record number of a participant in TEAMS. So for example, if Anson Green was the 1,900,000 entry into TEAMS record person added into TEAMS, his participant ID would be 1900000. You can now actually see this participant ID in TEAMS. Before, you could see it but you had to actually go up to the URL. Now you will actually be able to see the participant ID on the participant profile screen and you can search for a participant with this ID. And what this does is it allows you to discuss or share information about a participant without sharing PII in email, on the phone, in general.

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And what this looks like, is when you add a new participant, you don't add the participant ID. The participant ID is automatically calculated based on the record number that this becomes in the system. But once you've added that participant ID, when you go back to search for the participant, you will actually be able to search for the participant using that participant ID. It's important to know that the participant ID does not replace an SSN or document number. This is not a replacement number, rather it is just simply the record number of the participant, and gives you an alternative for identifying a participant, talking about a participant, locating a participant, etc. without using PII.

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And finally let's talk about the most exciting part of this release, which are the period of participations or POP.

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So just to reiterate, a period of participation begins each time an individual reaches 12 direct contact hours and is found eligible for AEL services by a pretest, and ends each time an individual goes 90 days without a participatory service. The POP is a new concept for adult education and literacy under WIOA and it has many implications on what is required for a participant during the time that they are in your program. So as you've heard me mention on multiple occasions, we are phasing in the periods of participation because TEAMS is still entirely around the concept of the program year. Everything starts anew on the program year so introducing this concept around a period of participation is very large. We wanted to be able to get out what we could as soon as we could which is why we are doing this in phases. This is phase one. Phase two of periods of participation will actually align the assessments around the periods of participation so that we can update all of those hand reports in teams related to outcomes, measurable skills gains, etc. and then phase three aligns the participant profile to the period of participation not the program year because as most of you know, every time a participant starts in your program anew, you need to collect those barriers to employment, that intake information, as opposed to every program year. It should not be updated every program year, rather it should just be updated when an individual has excited and then reentered your program.

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So let's talk about what is in this first phase of periods of participation. First off the participant screen now shows all of the periods of participation that an individual has had. You can also now pull two reports: the period of participation report or the period of participation summary report which shows you for a selected period the participants in your program, and then the period of participation extract which is similar to the report but has a lot more information about the individual's period of participation. So you can think of it as the period of participation report is essentially a day to day kind of management tool that you might use to understand what is happening during the program year, whereas the extract gives you a broader view of how many periods of participation an individual has, what is being considered in those periods of participation, the times the participant has been in adult education and literacy.

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So on the participant screen, you can now see the periods of participation and here you can see an example of a participant that has been added, their participant ID that we talked about a little bit earlier. And I want to go through some of these fields, and I'm not going to go field by field on the report. There is actually a report document in TEAMS that you will be able to view to understand what the various columns of a report means. But I want to talk about a few of these things because they're common across this screen of the report. So the first direct contact hour date is just that. It's the first date that a participant actually got direct contact hours in the program. The participation start date is the date that the participant reached those 12 direct contact hours. So in this example here, this individual had contact hours beginning on 7/25. They were very successful and actually got 6 hours that day, 6 hours the next day, and became a participant the very next day on 7/26, which is when they reached that 12th direct contact hour. If you have an individual who does not and has not become a participant yet, this participation start date is going to be empty because they haven't yet become a participant but they may have direct contact hours. The participation start date program year just tells you in which program year this person started their period of participation. The last service date is as of when you are looking at the screen, the last date that this individual received services. And then you have your exiter flag. The exiter flag will always be no unless 90 days since the last qualifying service. So again, you have to go 90 days without service before you can be considered an exiter. The exit is alw3ays retroactive back to that last service date. So if this says yes, that means 90 days has passed since that last service. Now one thing to keep in mind, there's a data entry led. So you may have a situation where someone has been indicated as an exiter because you haven't entered data for that particular individual yet. So it's just one thing to keep in mind. And then that information is constantly recalculating, so once you enter that data it will recalculate on this screen.

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Then we have the participant summary report or report summary. This can be found under reports, participants, and periods of participation. Again I want to reiterate, if you're watching this webinar early, you won't be able to see this until version 3.8 is actually released and you've received that notification. Until then, this report will not be there. But once it has been released, you can view this report. This report can be filtered like many of the other canned reports in TEAMS by funding source, provider, sites, class, and participant variables. And it contains key participant information for purposes of day to day program management. So you can see you have the participant name, the participant ID, date of birth, whether or not they're a participant, whether or not they have exited the program, when they actually became a participant, etc. So this individual on the screen actually became a participant back in 2013 and has continued to be a participant and had their last service on October 18th.

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The other valuable piece of information that is in the report summary is that it actually shows you how long it's been since that individuals last service date and when that participant will be considered an exiter. So that for the purposes of things like doing follow ups or checking in with students, you can sort and filter this report to be able to look at who are my individuals who are approaching exit? Are there individuals I need to touch base with to determine if they are coming back to the program? And at what point do I need to start doing follow ups for this individual.

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And then we have the participant report extract. This contains all the details about an individual's period of participation except their assessments and their outcomes and gains. Now I will say, this does include information about if they have a high school equivalency match, because that is in no way affected by the work we have to do to update the assessments in TEAMS around the periods of participation. However this report will not contain information about outcomes and gains because that still has to be updated around periods of participation in the system. You will notice that this indeed just an extract so it will always open in excel and look like this. It is not a nice pretty report that you can simply print, it will always be an excel document and that's because of the amount of information that is in the report. The other important thing about this report to keep in mind is that if an individual has multiple periods of participations, as is the case with this individual here, there will be a row for every single period of participation and the reason that is, is because career services are infinite, meaning you can always have more career services and the report is a set number of column widths. So for this individual, what this tells me is they have a period of participation that is all started with this information. It's all the same information but they have multiple career services, meaning a new row needed to be created for each career service.

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In terms of running either report, you can't pick a grant recipient until you've selected a start and an end date. Again, this report has nothing to do with the program year so the system doesn't know which grant recipients to show you, because you haven't yet told it which time period you're looking at. The other thing is you can only run these reports for a 3 year period. That was the maximum capacity that we determined for the largest grant recipient. So to avoid collapsing TEAMS, we had to limit the amount of data or the time period because there is a limit on the amount of data that the system can calculate.

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The grant recipients, once you enter the dates will filter for the active grant recipients during the time period you select and if you need to run for multiple grant recipients, right now you'll have to run multiple reports. Perhaps in a future iteration we can add an option for selecting multiple grant recipients but right now it's one at a time.

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I will tell you that this extract has a lot of information in it. You need to patient while the report runs. It's going to take a few minutes you know, to… 10 to 15 minutes depending on the amount of information that you're trying to run. And I haven't timed the largest report possible that you can run but I can tell you it takes a little bit of time to run the report because it is calculating a tremendous amount of information. So please just keep that in mind. You're going to need to be patient while this report runs. It's going to take a little bit of time to actually run in the system.

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The filters you select matter and what I mean when I say this is that if you select IET AEFLA funding source only, the report will only pull contact hours associated with IET AEFLA. So similar to other reports, any information that is tied to a funding source is going to be filtered by that funding source. So there are certain ways to run the report to get certain information about funding source or participants for funding sources etc. based on how you run the report. So those filters do matter and do affect what you're going to see when you actually run the report.

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So more information about running the report… the extract auto select will actually not include the social security number so you have to opt in to include the last 4 digits of the social security number on the extract. So again, if you want to include that information you have to actually select it. The extract includes all reportable individuals. This is different from the summary, this is the extract. All Reportable individuals, so anybody with a baseline assessment in profile. If you just want to see participants, meaning you just want to see individuals with 12 direct contact hours, you need to select the participant's only column. And keep in mind the report gives you information about whether or not someone's a participant. So whether you picked that or not, you're going to have information here on what's called the participant flag and again, within that report screen there's a summary of what each of these columns means, how its calculated, but for that participant flag, that information will say yes if they're a participant. If it says no, they're just a reportable individual.

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And then again, please please please, that report description is going to actually outline what each of those columns means, so it's important that you take a look at that in the system to better understand what each of those columns are actually meaning when you're pulling the reports.

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So that is actually all we're going to cover on this webinar and I know many of you are like "I want to know more about the report. I want to know how it works". It is a lot of information so our goal with this webinar is just to share with you what is coming so that you can be prepared, know what's different. However we're going to be doing similar to what we did with measurable skills gains and scheduling virtual real time training sessions that actually outline how to use and understand the new reports. But in the meantime we really encourage you to begin trying them, running them, seeing what they look like. I will tell you that those of you that have attended a regional accountability event probably fared a little bit better in this webinar than those who have not. Individuals with any accountability oversite or accountability training responsibilities should really be attending one of these events this fall. I want to stress these are not TEAMS trainings events. These events talk very little about TEAMS and that is not the goal. Rather the goal of these trainings is so that you understand how accountability works so that you can better understand some of the functionality that is being added into the TEAMS system. So it's really important for the purposes of understanding kind of the why and attending those accountability events helps you kind of understand once you actually see these extracts and these reports why an exit might occur on a certain date based on when the last contact for the participant was and how those things kind of all work together. That's a huge topic of what we cover at those regional accountability events. Again I want to stress these are not TEAMS trainings. We will actually not spend a tremendous amount of time if any covering these new reports in those trainings and that's because it's simply not the right set up and there's already a tremendous amount of information to cover rather these reports will be covered, or this report will be covered in those virtual training sessions. So my recommendation would be to attend the regional accountability event first and then participate in one of those virtual training sessions to better understand kind of how those two things all go together. If you need information on the accountability events, so not the real time training sessions. We haven't issued any information on those yet. But if you need information on the accountability events, please feel free to contact me and I'll make sure that you get that information on where the event is in your area to make sure that you can get registered. We have just begun those so we still have quite a few sessions happening this fall.

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As always please direct your questions to your assigned program specialist, but I'm also asking that you include a copy to Charmagne Coston on our team. She is really my right hand in a lot of this development and can help field some of the questions related to how things are working in TEAMS and help better support the whole team since there's a lot of questions and only a few of us. So to make sure that we can collect that information and better understand where the gaps are I ask that you please copy her on your email so we can make sure that we get out the necessary training answering. Questions addressing any discrepancies, things like that, in a timely manner.

So again, with that, this concludes this particular webinar. However we ask that you please bear with us as we continue to get more training out about how to actually use these reports to manage your program. I think many of you will find that they will bridge a lot of the gaps that you have had related to understanding who is a participant in your program. Who is being counted towards participation in your program and we thank you so much for your patience while we've worked through all of that.

So with that, excited for all of you to log into the new system beginning Monday October 22nd. Thanks so much.