



TQA Data Reporting System

Rev. September 10, 2020

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TQA Data Reporting System

Introduction

The Tech Quest Apprenticeship (TQA) data reporting system provides a comprehensive view for collecting, tracking, and reporting participant and employer data. Key features include participant tracking from entry to post-exit, a self-registration option for applicants, employer relationship management, and program results reporting and analysis. The system allows us to understand our participants, including demographics, program enrollments, services provided, and results achieved. Additionally, it can connect enrolled participants with employers who are hiring apprentices by posting and subsequently filling registered apprenticeship occupations. The participant and employer data entered into the system by the LWDBs will be used to report quarterly performance data to the U.S. Department of Labor. Therefore, it is imperative that data entry occurs timely and accurately.

This guide will provide LWDB staff with instructions for recording program activities and services provided to both participants and employers.

Self-Registration

To create a new participant record, LWDBs have the option of utilizing the online application (self-registration) feature which directs applicants to a secure website where they can directly apply for TQA. Or, staff can manually enter the self-registration required fields for a participant if the information is collected and secured through alternate means (e.g. paper-based application, intake forms, etc.). In this section of the guide, the online application feature is described (next section below, “Managing Participants,” describes the steps for staff to register, enroll, and manage participants).

Individuals interested in enrolling in TQA can complete and submit a web-based application directly through the TQA Data Reporting system. The secure online application also features the ability for applicants to upload copies of eligibility documents (e.g. DL, SS card, birth certificate, etc.). LWDB staff can then review the applicant’s information and subsequently record program activities provided to those deemed eligible and enrolled all in one comprehensive system.

To complete the online application, applicants will be directed to the Self-Registration module in the TQA Reporting system. The self-registration (online application) will appear as follows (your LWDB name will automatically appear in the “Organization” field at the top):

The screenshot shows a web-based self-registration form for the TQA Data Reporting System. The form is titled "Scaling Apprenticeship" and "Self Registration". It includes a "Save" button and a "Cancel" button. The form is divided into several sections:

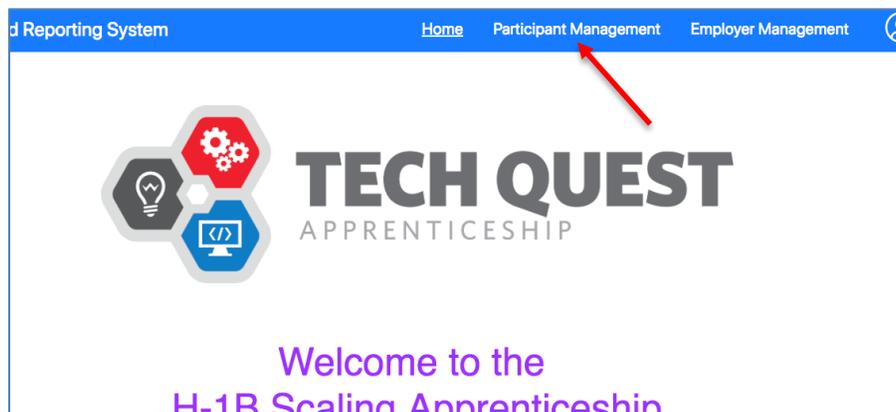
- Registration:** Organization (Clark University)
- Identifying Information:** First Name, Middle Name, Last Name, Date of Birth (mm/dd/yyyy), SSN
- Demographics:** Sex (Male, Female, Participant Did Not Self-Identify), If you have a disability, please list information about it here, Eligible Veteran Status (Yes <= 180 Days, Yes, Eligible Veteran, Yes, Other Eligible Person, No), Ethnicity: Hispanic/Latino (Yes, No, Participant Did Not Self-Identify), Asian (Yes, No, Participant Did Not Self-Identify), American Indian / Alaska Native (Yes, No, Participant Did Not Self-Identify)

Applicants will complete each required field, at minimum, and then will have to scroll back to the top of the page to select “Save” (it appears gray until all required fields are entered, and will turn blue indicating when all fields are complete and it’s ready to submit). Once the applicant clicks on the blue “Save” button, the application is submitted and ready for staff review.

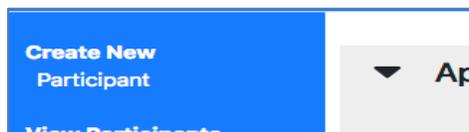
To utilize the document upload feature in the self-registration feature, applicants will need to have documents scanned and readily available to upload at the time they self-register. Currently, there is not a way for the applicant to go back in later to submit documents once the application has been saved (and thus, submitted).

Managing Participants

To enter (register) a new applicant (not using the self-registration feature as described above), staff can manually create a new participant record and enter the required information collected through some other format (e.g. paper-based application, intake form, etc.). To do so, staff will log in to the Data Reporting system and click on “Participant Management” in the blue bar at the top of the screen.



On the left side of the screen, under “Create New” select, “Participant” as shown:



The Participant Profile screen collects applicants’ demographic information and registers them into the system. This is the same screen as the self-registration screen where applicants can self-register (shown and described above). Staff may collect applicant information through other means (paper-based application) and complete the registration fields here.

Staff should only complete the fields in the top section of this page and **stop** at “Additional Information” leaving the remaining fields blank (this is the section of the online application to only be completed by applicants using the self-registration process). Leaving the additional information fields blank indicates this is a staff entered registration, and an alternative document was used to collect the same or similar information. In this case, the staff member should upload a copy of the paper-based application, intake form, or similar document used (see section of guide for how to upload documents to a participant record).



Additional Information

Are you a U.S. citizen or authorized to work in the U.S.? Yes No X

Are you an ex-offender (subject to any stage of justice process)? X

Once the required fields are completed, click the “Save” button at the top of this screen.

Once an applicant is registered (either through the self-registration process or via direct staff entry), the individual’s form will appear in the “Not Yet Validated Participants” screen. Staff will need to “validate” the participant’s information before you can advance further. To do so, staff will select “Not Yet Validated Participants” on the left-hand side of the screen under “View Participants,” as shown:

Last Name	First Name
Again	Erin
Jasz	E

For self-registrations, staff should review the data entered on this screen and confirm that all appears to consist of valid data (e.g. no “Mickey Mouse” entry for name, etc.). Once all required fields (indicated by asterisks) are entered and/or verified by staff, change the “Validation Status” field from not validated to validated. Then click Save at the top. Changing the status to “Validated” will remove the participant from Not Yet Validated screen to the “Validated Participant” screen.

Participant Profile

Staff Organization: * Clark University X i

Assigned Staff: * X

Validation Status: * Not Validated X

Identifying Information

Validated

Not Validated

If the individual registered did not enter complete or valid data, mark “not validated” (process stops here until corrections or other required actions are completed). Save.

For all registered (approved) individuals, proceed with next steps to initiate enrollment into the TQA program. Up to this point, only the application has been submitted and verified as adequate to proceed toward full program enrollment.

Enroll in Program

To locate a participant record (once validated), select either “Validated Participants” or “My Participants” in the left-hand side of the screen. Either method will show you the list of participant records organized alphabetically. Locate and select the participant’s record. In the participant’s case folder, select “Program” under “Create New” (top left of page in blue column):



The “Program Information” page identifies the program they will be enrolling into (Tech Quest Apprenticeship) and identifies the applicants characteristics required for data collection to USDOL and eligibility determination. Staff should utilize the application information collected, eligibility supporting documents, and/or other acceptable forms to complete the fields. Please review the LWDB Resource Guide for details on eligibility and program requirements. The screen below is a sample of the data collected. The light blue bubbles with the “i” in the center contain helpful information and tips for completing fields. Once all fields are entered, click “Save” at the top of the page.

Program Information

Participant
* Sue, Sally (2005-01-01)

Program * Tech Quest Apprenticeship	Funding * Scaling Apprenticeship (2019-07-01 - 2	Apprenticeship Type (Special Project Id - 1) * Pre-Apprenticeship
Date of Program Entry * mm/dd/yyyy i	Date of Program Exit mm/dd/yyyy i	Other Reasons for Exit ↓

Program Characteristics

Highest School Grade Completed at Program Entry * ↓ i	Highest Educational Level Completed at Program Entry * ↓ i	English Language Learner at Program Entry * <input type="radio"/> Yes <input type="radio"/> No
Employment Status at Program Entry * <input type="radio"/> Employed <input type="radio"/> Employed, but Received Notice of Termination <input type="radio"/> Not in Labor Force <input type="radio"/> Unemployed i	Long-Term Unemployed at Program Entry * <input type="radio"/> Yes, Unemployed >= 27 Consecutive Weeks <input type="radio"/> No i	Underemployed Worker * <input type="radio"/> Yes <input type="radio"/> No
Low Income Status at Program Entry * <input type="radio"/> Yes <input type="radio"/> No i	Ex-Offender Status at Program Entry <input type="radio"/> Yes <input type="radio"/> No i	Recipient of Incumbent Worker Training H-1B

Attaching Documents

Documentation supporting the eligibility of the individual must be uploaded into the system. The applicant can upload their own documents in the self-registration screen, or staff can upload the documents. To attach documents to the individual’s record, select “participant attachment” (under Create New column on the left side of the screen). As shown below, select the file to attach, enter date of attachment, type of attachment, and a brief description of the document:

Save Cancel

Attachment

Participant
* Sue, Sally (2005-01-01)

File
* No File Selected

Date of Attachment * mm/dd/yyyy **Type**

Description
*

Comments

- ✓ State Issued ID / Drivers License
- Social Security Card
- Birth Certificate
- DD214
- Resume
- Eligibility Checklist
- Self-Attestation Form
- Media Release Form
- Other

There is no limit to the type or number of documents that can be retained in the system for a single participant. If an LWDB chooses to store all participant related documents in this system, they may do so (e.g. copies of assessments, career plans, etc. – simply choose “other” for type and enter a description or any other comments to note on this screen).

Entering Services

Now that the applicant is enrolled in TQA, their first service should be recorded next (the first service will trigger the individual as a participant of the grant). Use the left side bar in blue (under “Create New”) to begin entering services. If the first service was an assessment, click on “Assessment” and enter the information on that screen. For all other case management and support services (not including training), you will record a new service in the “Service” link on the left of the screen. Other than assessments and training activities, all services will fall under two categories: case management services or support services. Choose the service type that most closely represents the service provided to the participant. An example is shown below.

Service

Participant
* Sue, Sally (2005-01-01)

Related Program
* Sample Program Name, Funded By Scaling Apprenticeship (Entry Date: 2020-05-01, Exit Date: 2020-05-01)

Employer

Start Date * 05/20/2020 **End Date** * mm/dd/yyyy **Service Type** *

- Case Management - Career Planning
- Case Management - Counseling / Mentoring, Including Referrals to Outside Agencies
- Case Management - Job Search or Referral
- Case Management - Pre-Employability Skills
- Case Management - Resume Assistance
- Supportive - Child / Dependent Care
- Supportive - Needs Related Payment
- Supportive - Tools/Supplies
- ✓ Supportive - Transportation
- Supportive - Work Attire / Uniforms

Training

To record pre-apprenticeship and registered apprenticeship activities, select (under Create New) “Training.” Enter the name of the training program the participant is enrolled, the related O*Net Code, start date of the training, type of training service, and primary type of training service. Pre-apprenticeship programs will fall under the “Occupational Skills Training” type. Once a participant’s training ends, you will edit the training activity and enter the “End Date” field and Training Completed field. Doing so will close out this training activity. If an individual enters multiple training programs (e.g. pre-apprenticeship and then enrolls into a registered apprenticeship program) create a new training service for each program.

Training

Participant Id
* Sue, Sally (2005-01-01)

Related Program
* Sample Program Name, Funded By Scaling Apprenticeship (Entry Date: 2020-05-01, Exit Date: null)

Name * CyberSecurity Pre-Apprenticeship Program **Occupational Skills Training Code** * 13119902

Start Date * 05/24/2020 **End Date** * 07/31/2020 **Training Completed** Yes

Type of Training Service * Registered Apprenticeship **Primary Type of Training Service** * Classroom Occupational **Secondary Type of Training Service** **Tertiary Type of Training Service**

Use the appropriate code to indicate the primary

Important Step: In addition to entering the training activity, return to the participant’s **Program** page and edit the “Apprenticeship Type” field to the appropriate selection (e.g. pre-apprenticeship, registered apprenticeship), as shown:

Program Information

Participant
* Sue, Sally (2005-01-01)

Program * Tech Quest Apprenticeship **Funding** * Scaling Apprenticeship (2019-07-01 - 2020-07-01) **Apprenticeship Type (Special Project Id - 1)** * Pre-Apprenticeship



For registered apprenticeships ONLY (does not apply to pre-apprenticeships), scroll further down the **Programs** page, and edit the apprenticeship training information in those fields as shown below:

Apprenticeship Training During Enrollment

These fields are only available for participants who are enrolled in a Registered or Unregistered Apprenticeship.

Participated in Postsecondary Education During Program Participation
 Yes No

Date Enrolled, During Program Participation, in an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment
mm/dd/yyyy

Measurable Skills Gain

Participants enrolled in training activities will be required to document and record measurable skills gains (see Resource Guidebook for details on MSGs). Each time a participant achieves a training milestone or skills progression, create a new “Measurable Skills Gain” as demonstrated below:

Measurable Skills Gain	
Participant	
* <input type="text" value="Sue, Sally (2005-01-01)"/>	
Related Program	
* <input type="text" value="Sample Program Name, Funded By Scaling Apprenticeship (Entry Date: 2020-05-01, Exit Date: null)"/>	
Date	Type
* <input type="text" value="05/01/2020"/>	* <input data-cs="2" data-kind="parent" type="text" value="Training Milestone"/> <input type="button" value="i"/>
Reason for Skills Gain	
<input type="text" value="Completed OJT hours."/>	

Credentials

Credentials and certifications attained, as a result of training, must be recorded by selecting create new “Credential.” Complete the fields in the screen. The “date of credential” field should be the date the individual earned the credential (typically noted on the certificate) and not the date staff are entering the credential. Multiple credentials may be entered (create a new one for each credential earned).

Employment

When participants obtain employment (including those hired as part of a registered apprenticeship program), the information should be collected and entered by creating a new “Employment” record. All fields (shown below) must be completed and saved in the system.

Create New Program Assessment Training Credential Measurable Skills Gain Work Experience Employment Service	Participant Cas
	Participant Profile
	Last Name
	<input type="text" value="Ahmed"/>
	▼ Programs

If the participant is hired by an employer already registered in the system, select the employer name in the drop-down menu. If you click the drop down and the employer name does not show up, a staff person will need to navigate to the employer management module first and create the employer profile from there, save it, go back to the participant form, and the employer name will show up in the drop

down. Please refer to the Employer Management section below for instructions on adding and managing employers.

It should be noted that the employment information section in the screen (shown below) is titled “Apprenticeship Information.” This screen is **not** limited to just employment associated with an apprenticeship program but is to be used to record all participant employment information regardless if it is part of a RAP/IRAP. For example, if a participant only completed a pre-apprenticeship program or received other TQA services (and did not advance into a RAP/IRAP) then their employment information should also be recorded here (disregard the title of that field). We are interested in collecting employment information on ALL participants not just those attaining employment through a registered apprenticeship opportunity.

Program
* Tech Quest Apprenticeship, Funded By Scaling Apprenticeship (Entry Date: 2020-06-15, Exit Date: null) X

Employer
Where in the World Yoga & Wellness, LLC ([...]) X

Apprenticeship Information

Apprenticeship Hire Date 09/01/2020 **End Date** mm/dd/yyyy

Job Title Cybersecurity Technician **Industry Sector** Community and Social Service Occupations X

Wage Type Hourly X **Wage** 18

Original Employment Information

Employment Hire Date mm/dd/yyyy **End Date** mm/dd/yyyy

Job Title **Industry Sector** X

Wage Type X **Wage**

Closing a Case

Once a participant completes all their training and program activities, be sure to go back to those activities (Service screen) and close them by editing the training activity or service to include an end date and the outcome such as “completed” (see sample screen below). Enter any final attainment of measurable skills gains, credentials, and/or employment.

	Start Date	End Date	Primary Type of Trainin...	Se
	Filter...	Filter...	Filter...	Fit
	06-15-2020	07-17-2020	Classroom Occupational Trai...	

Related Program

* Tech Quest Apprenticeship, Funded By Scaling Apprenticeship (Entry Date: 2020-06-15, Exit Date: null) X

Name
* Franklin Digital Pre-Apprenticeship

Occupational Skills Training Code
* 15115100

Start Date
* 06/15/2020

End Date
* 07/17/2020

Training Completed
Yes

Type of Training Service
* Occupational Skills Trainir X

Primary Type of Training Service
* Classroom Occupational 1 X

Secondary Type of Training Service
X

Tertiary Type of Training Service
X

Next, return to the Program tab in the case by selecting the edit button in “Programs.” To “close” the case when services are all closed and no longer needed, enter the “date of program exit” and “other reasons for exit” fields (select “no” in the latter drop down if none of the global exclusions listed apply).

Program
* Tech Quest Apprenticeship X

Funding
* Scaling Apprenticeship (2019-07-01 - 2023-06-30) X

Apprenticeship Type (Special Project Id - 1)
* None X

Pre-Apprenticeship Type (Special Project Id - 2)
* Pre-Apprenticeship X

Date of Program Entry
* 06/15/2020

Date of Program Exit
mm/dd/yyyy

Other Reasons for Exit
X

Program Characteristics

Highest School Grade Completed at Program Entry
* 12th Grade X

Highest Educational Level Completed at Program Entry
* Attained a Postsecondary Technical or Voca X

English Proficiency
* Reserve Forces Called to Active Duty X

Employment Status at Program Entry
 Employed
 Employed, but Received Notice of

Long-Term Unemployed at Program Entry
* Yes, Unemployed >= 27 Consecutive Weeks X

Underlying Reasons for Exit
* No X

- Institutionalized
- Health/Medical
- Deceased
- Reserve Forces Called to Active Duty
- Foster Care
- Ineligible
- No

For participants enrolled in registered apprenticeships, scroll down this same page (Program page) and update the “Apprenticeship Training During Enrollment” applicable fields including: “date completed, during program participation, an education or training program leading to a credential or employment.” Also select whether or not the employment attained was related to training.

Apprenticeship Training During Enrollment
These fields are only available for participants who are enrolled in a Registered or Unregistered Apprenticeship.

Participated in Postsecondary Education During Program Participation
 Yes No

Date Enrolled, During Program Participation, in an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment
mm/dd/yyyy

Date Completed, During Program Participation, an Education or Training Program Leading to a Recognized Postsecondary Credential or Employment
mm/dd/yyyy

Training-Related Employment

Incumbent Worker Follow-Up Information

For incumbent workers who have completed their training program, complete the required fields below (under the heading: “Post-Completion Follow-Up Information”):

Post-Completion Follow-Up Information

These fields are only available for participants who are receiving Incumbent Worker Training and have completed their Training Program.

Incumbent Worker Retained Current Position in the 1st Quarter After Completion	Incumbent Worker Advanced into a New Position with Current or New Employer in the 1st Quarter After Completion
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 
Incumbent Worker Retained Current Position in the 2nd Quarter after Completion	Incumbent Worker Advanced into a New Position with Current or New Employer in the 2nd Quarter After Completion
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 
Incumbent Worker Retained Current Position in the 3rd Quarter After Completion	Incumbent Worker Advanced into a New Position with Current or New Employer in the 3rd Quarter After Completion
<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Information Not Yet Available 

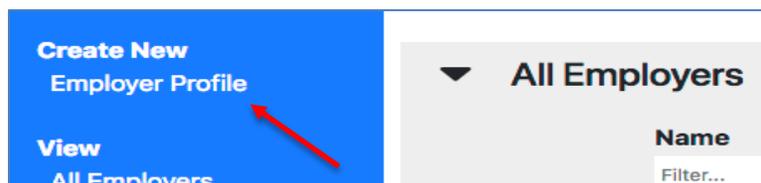
Managing Employers

For employment to be recorded for participants, each hiring business will need to be entered into the TQA Data Tracking and Reporting System. To enter new and manage existing employers, click on the “Employer Management” link on the top right of the screen (in blue bar).



Register Employer

To register a new employer into the system, under “Create New” select “Employer Profile” (in the top left side of the employer home page screen), as shown:



In the Employer Profile screen, those fields that include an asterisk are the only required fields however LWDBs may include other basic registration information such as the employer’s web site URL, address, phone number, etc.

It is **important** to note that the “Engagement Date” field is the date in which the employer committed to engage in an apprenticeship program and in hiring program participants (on-the-job training). Typically, the date entered is the date of the OJT Contract, apprenticeship agreement, or similar document. The engagement date should ONLY be entered for registered apprenticeship programs (otherwise leave this field blank if they do not engage in a program and are only being entered to capture placement information for a participant(s)).

Employer Contacts

Next, create a new “Employer Contact” to identify the business’ primary contact. Create a new employer contact for each individual at the business who will be working with staff in placing participants at the worksite.

Employment Opportunities

To enter employment opportunities to be filled by program participants, create a new “Employment Opportunity” by selecting the link in the blue column on the screen. As noted in the instructions at the top of this screen, if this is an open and available job to be filled, then leave the participant and program fields blank in addition to hire (start) date and end date. These fields will be completed (edited) once a participant is matched with an employer and is hired for the position. Consequently, this screen serves two purposes. One is to list the open and available jobs. The second is to record the placement once the job opening is filled.

For each position the employer is hiring, create a new “employment opportunity” to show the multiple job postings. This also includes multiple openings for a single occupation (e.g. employer is hiring 3 web developers – enter three web developer employment opportunities to enter and fill the three jobs).

Filled Positions

When the position is filled, select the participant name from the drop-down menu, the Program, the participant’s hire (start) date, the job title, industry sector, wage type, and wage. Click “save” at the top of the screen (demonstrated below):

Employment

Open Employments and Placements:

If this is an open Employment Opportunity that you want filled leave the Participant and Program field blank.

If you are placing a participant in an open Employment Opportunity select the Participant and Program.

Employer

Participant

Program

Hire Date **End Date**

Job Title **Industry Sector**

Wage Type **Wage**

When an employment opportunity is filled, the job posting will no longer appear in the “employment opportunity” screens. Instead, it is moved to “Fulfilled Employment” in the employer’s folder, as shown below.

Fulfilled Employment			
Start Date	End Date	Job Title	Participant
Filter...	Filter...	Filter...	Filter...
 06-01-2020		Business Analyst	Sue, Sally (2005-01-01) 

Page Size 5 | First | Prev 1 Next | Last

▼ Open Employment Opportunities

LWDBs can enter employer activities in the data reporting system. The purpose of this screen is to capture any progress, contacts, or follow up activities (similar to entering case notes when staff interact with employers). The illustration below is an example:

Save Cancel

Employer Activity

Related Employer
* ABC123 Corp. ([...])

Related Employer Contact
* Doe, John (Primary Contact: Yes)

Title
* OJT Invoice Needed

Type * Call **Initial Contact** * No **Status** Closed

Planned Date 05/25/2020 **Actual Date** 05/25/2020

Comments
Called employer regarding his April OJT invoice - has not yet been received. Employer stated he would submit his invoice and payroll records for reimbursement by EOD.

Employer Attachments

Staff can upload any employer related materials to the employer account in the system. Examples of employer documents may include a position description, OJT contract, reimbursement invoice, and supporting documents to verify the reimbursement amount requested (payroll records, etc.).

To upload documents, in the blue column on the left-hand side of the Employer Management screen create new "Employer Attachment." Select the file to upload, date of attachment, the document type, a brief description and/or comments if needed.

Employer Attachment

Employer
* ABC123 Corp. ([...])

File
No File Selected

Date of Attachment 06/09/2020 **Type** OJT Contract
 OJT Reimbursement Invoice
 Payroll Records
 Other

Description
May 2020 Reimbursement Invoice

Comments
Employer submitted their reimbursement invoice for the month of May for participants John Doe, Sally Sue, and Jane Smith.