TQA Data Reporting System

Rev. September 10, 2020

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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.

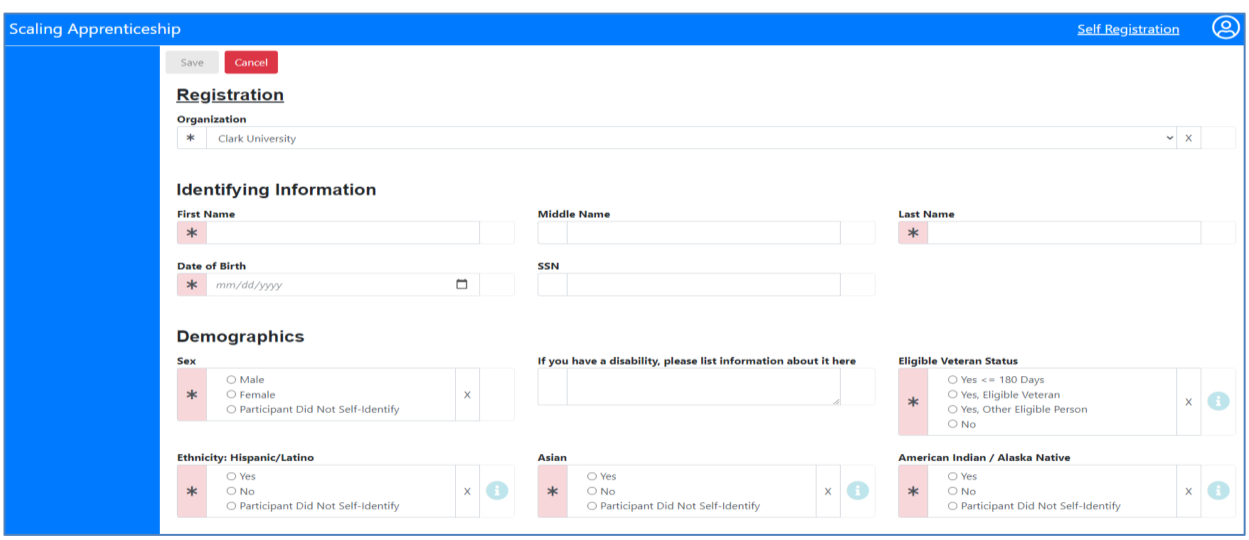
This guide will provide LWDB staff with instructions for recording program activities and services provided to both participants and employers.

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):

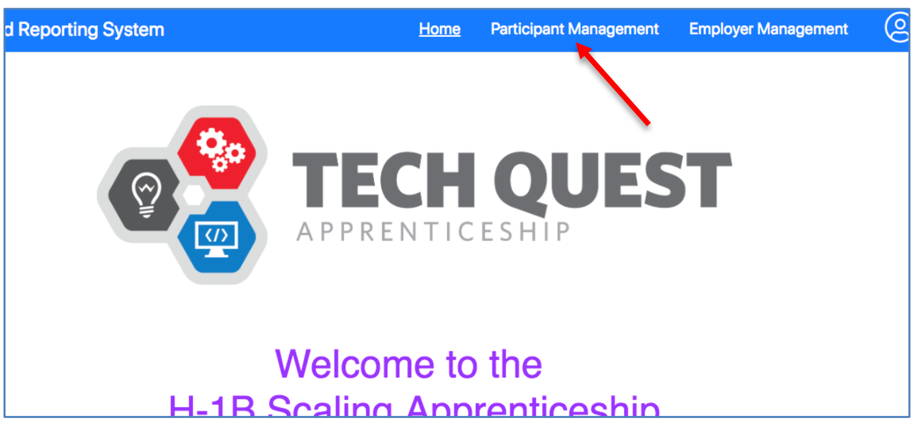


Applicants will complete each required field, at minimum, and then will have to scroll back to the top of the page to select “Save” (it appears gray until all required fields are entered, and will turn blue indicating when all fields are complete and it’s ready to submit). Once the applicant clicks on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

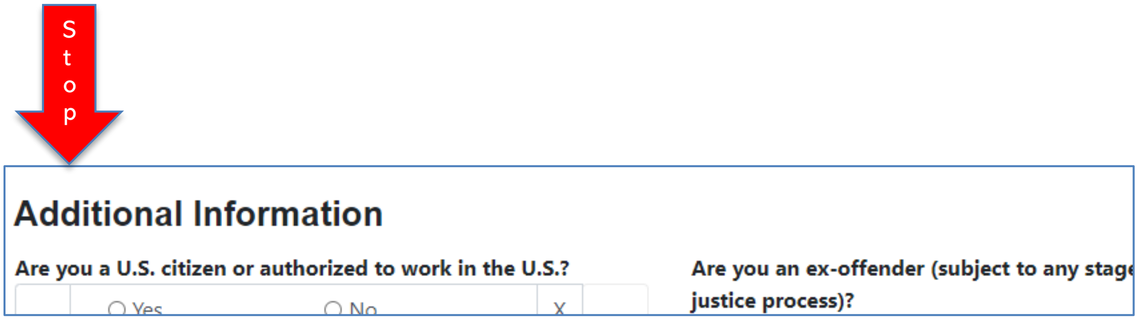
To enter (register) a new applicant (not using the self-registration feature as described above), staff can manually create a new participant record and enter the required information collected through some other format (e.g. paper-based application, intake form, etc.). To do so, staff will log in to 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:

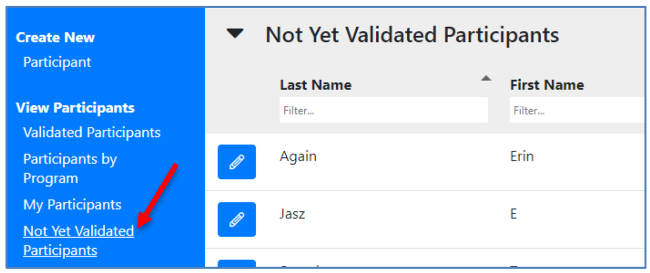
The Participant Profile screen collects applicants’ demographic information and registers them into the system. This is the same screen as the self-registration screen where applicants can self-register (shown and described above). Staff may collect applicant information through other means (paper-based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



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:



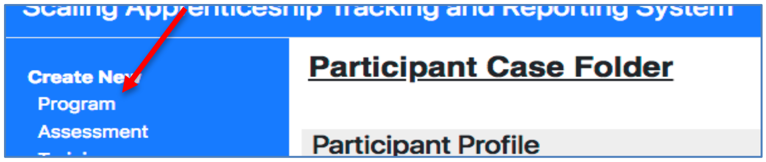
For self-registrations, staff should review the data entered on this screen and confirm that all appears to consist of valid data (e.g. no “Mickey Mouse” entry for name, etc.). Once all required fields (indicated by asterisks) are entered and/or verified by staff, change the “Validation Status” field 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.

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.

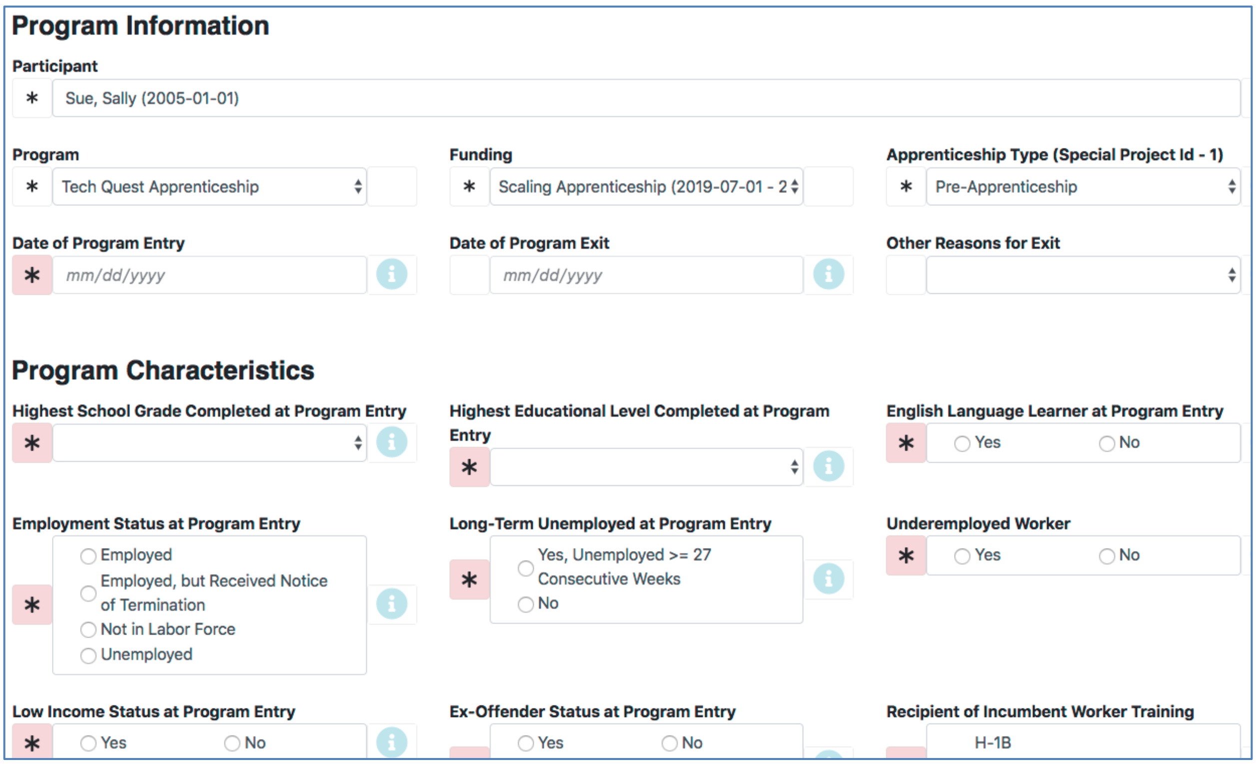
For all registered (approved) individuals, proceed with next steps to initiate enrollment into the TQA program. Up to this point, only the application has been submitted and verified as adequate to proceed toward full program enrollment.

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):

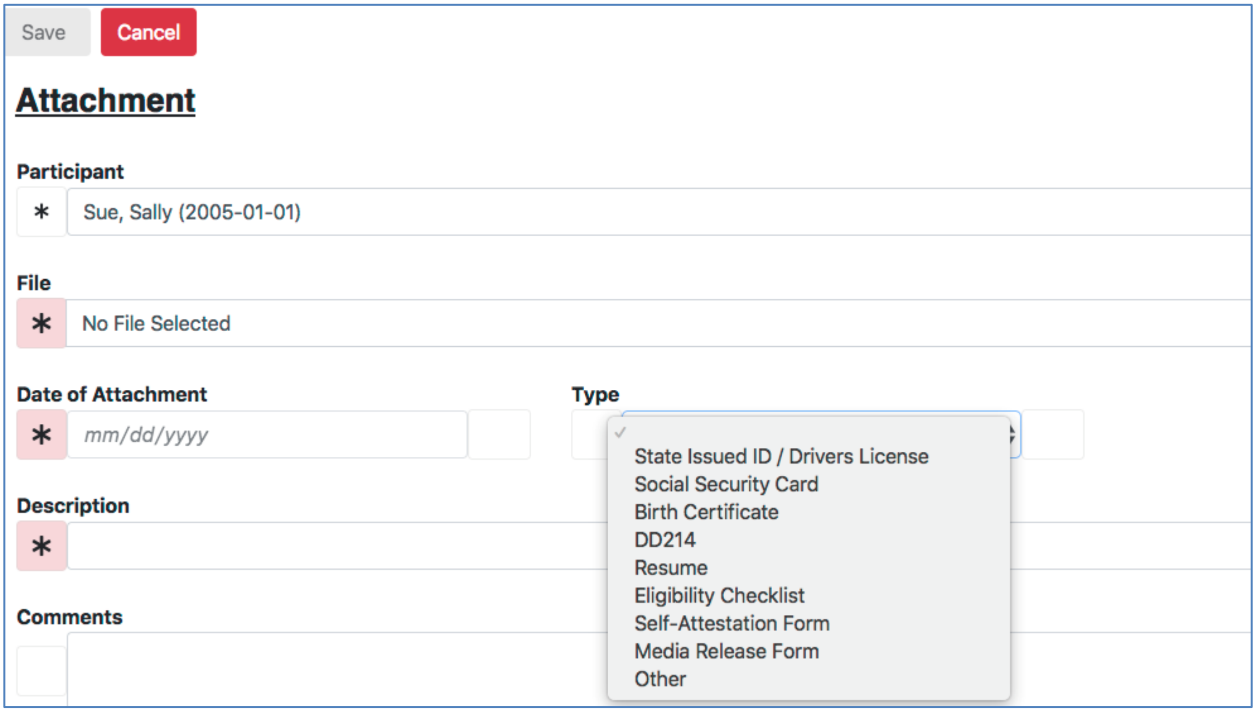


The “Program Information” page identifies the program they will be enrolling into (Tech Quest Apprenticeship) and identifies the applicants characteristics required for data collection to USDOL and eligibility determination. Staff should utilize the application information collected, eligibility supporting 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.



Attaching Documents

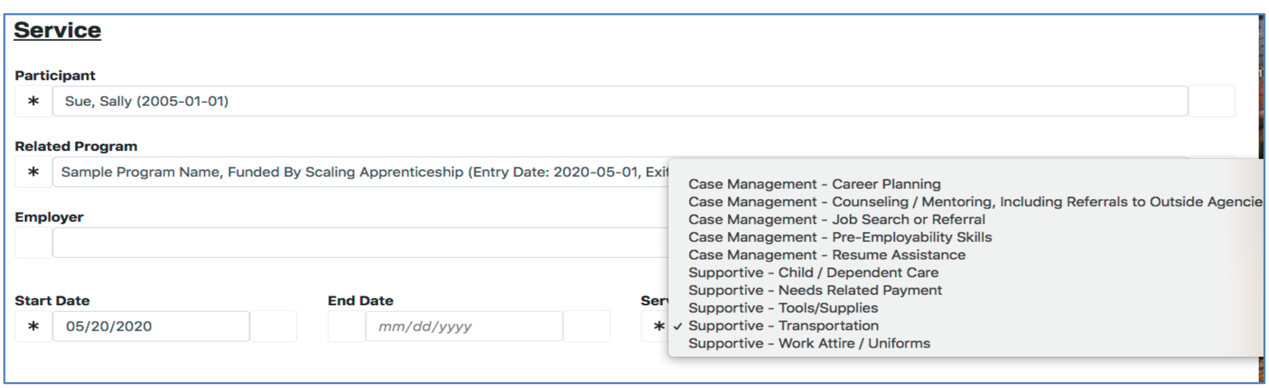
Documentation supporting the eligibility of the individual must be uploaded into the system. The applicant can upload their own documents in the self-registration screen, or staff can upload the documents. To attach documents to the individual’s record, select “participant attachment” (under Create New 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:



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).

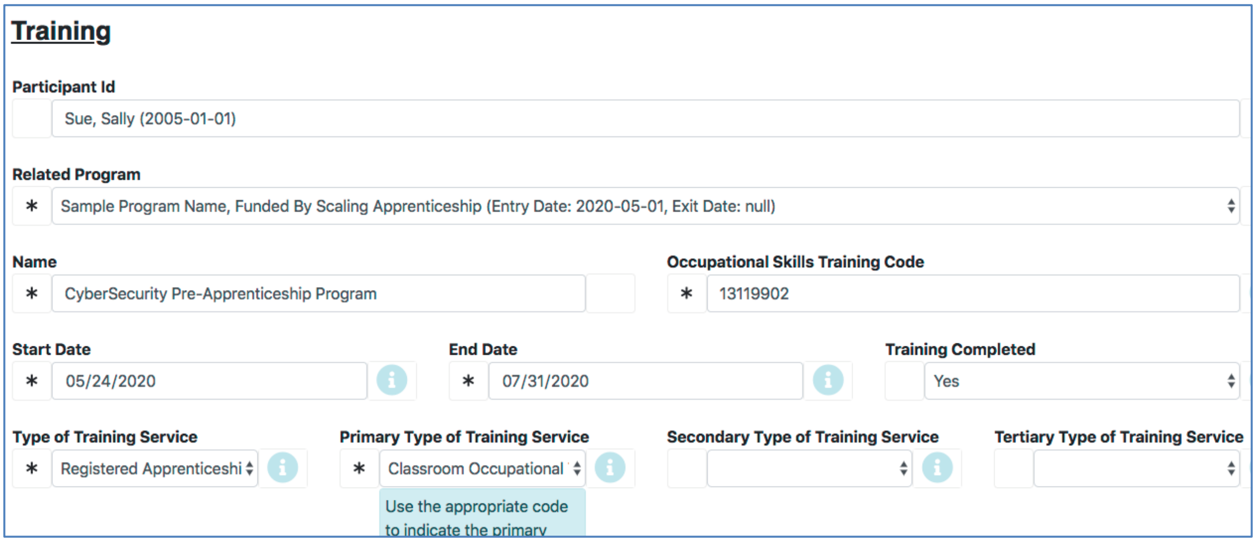
Entering Services

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.



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 Apprenticeshi

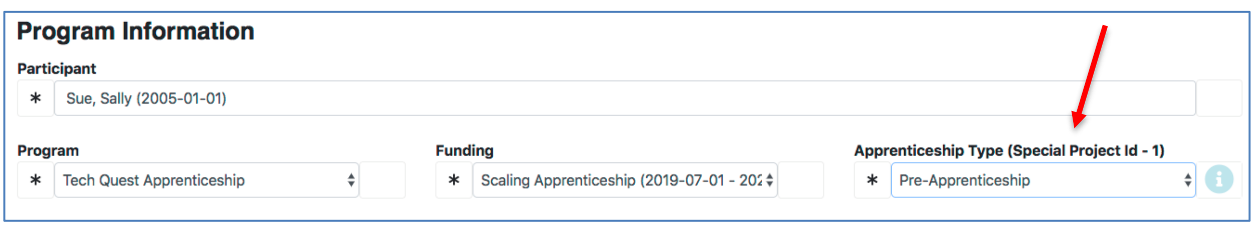
Primary Type of Training Service
* Classroom Occupational

Use the appropriate code to indicate the primary

Secondary Type of Training Service

Tertiary Type of Training Service

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

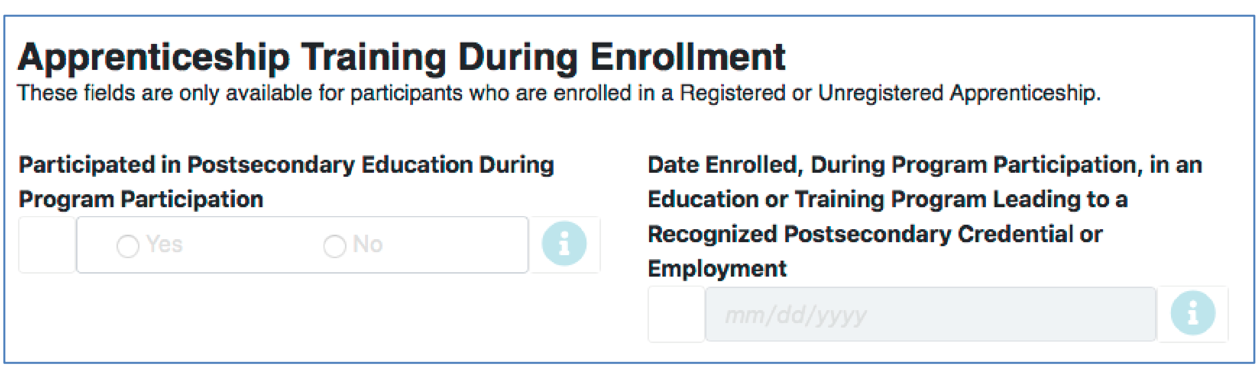
Participant
* Sue, Sally (2005-01-01)

Program
* Tech Quest Apprenticeship

Funding
* Scaling Apprenticeship (2019-07-01 - 202

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

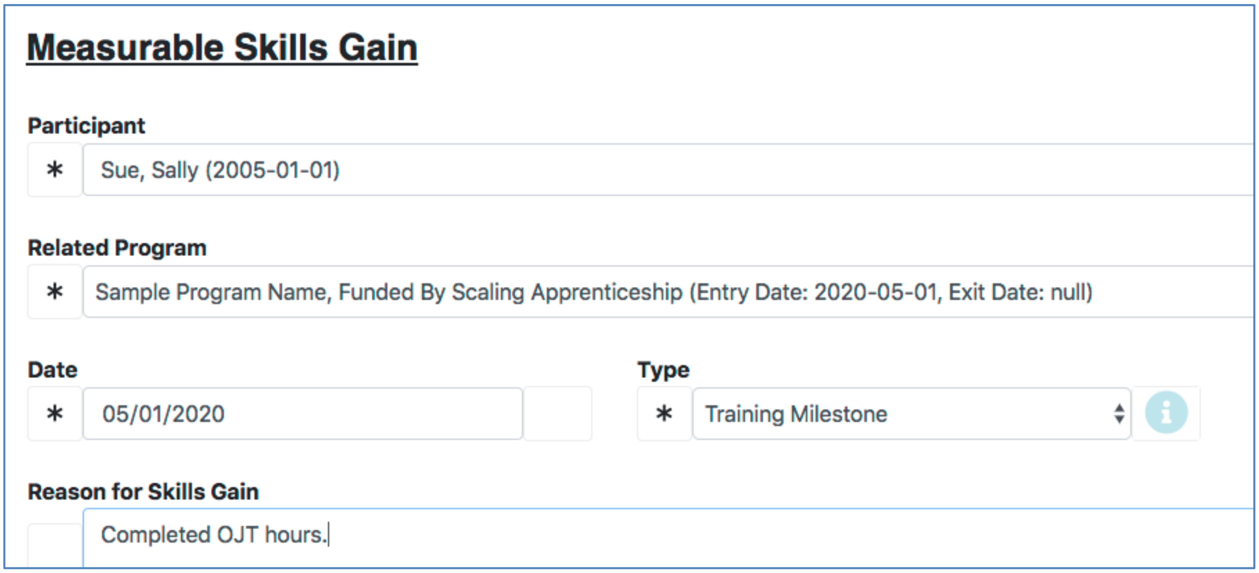
Yes No

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:

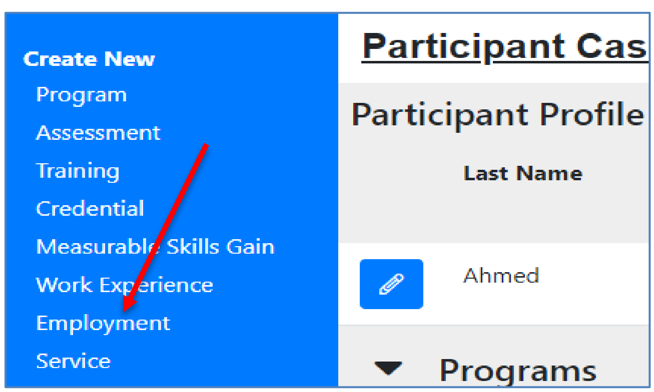


Credentials

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).

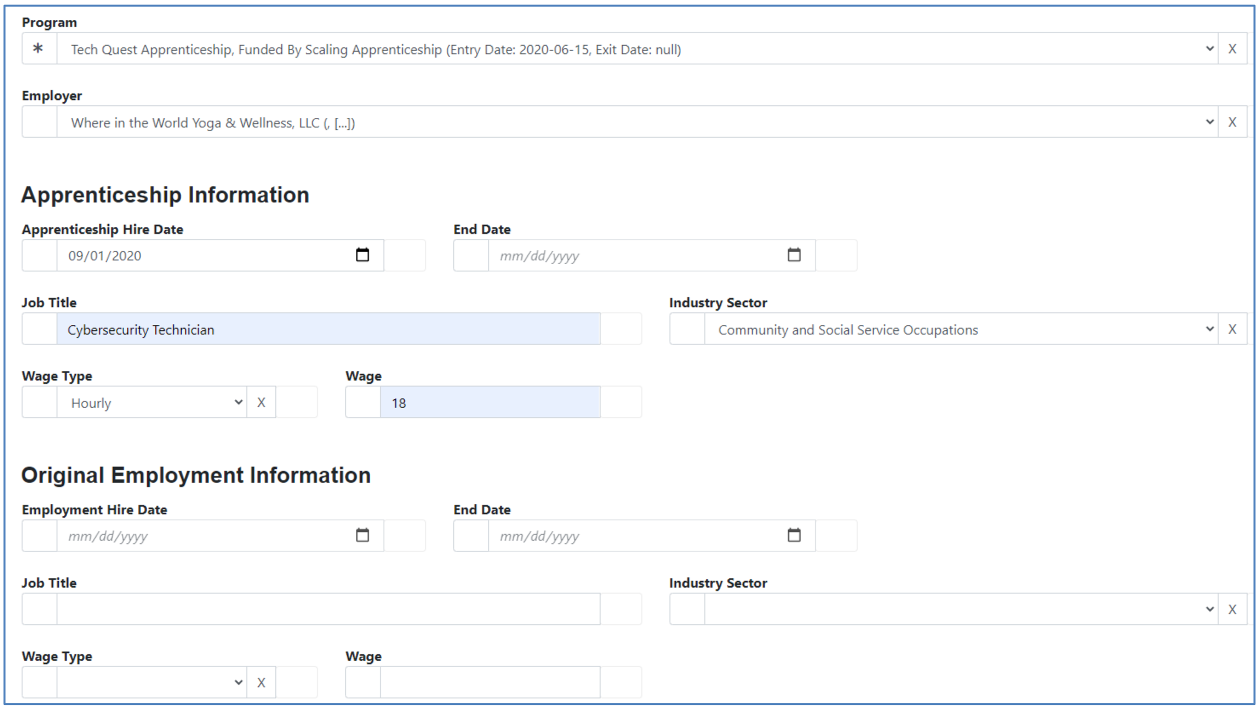
Employment

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.



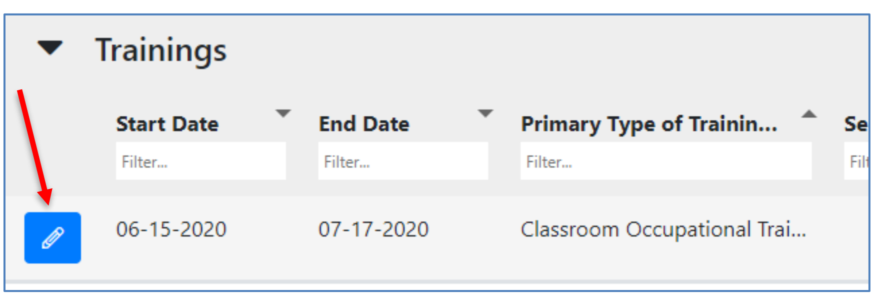
If the participant is hired by an employer already registered in the system, select the employer name in the drop-down menu. If you click the drop down and the employer name does not show up, a staff person will need to navigate to the employer management module first and create the employer profile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

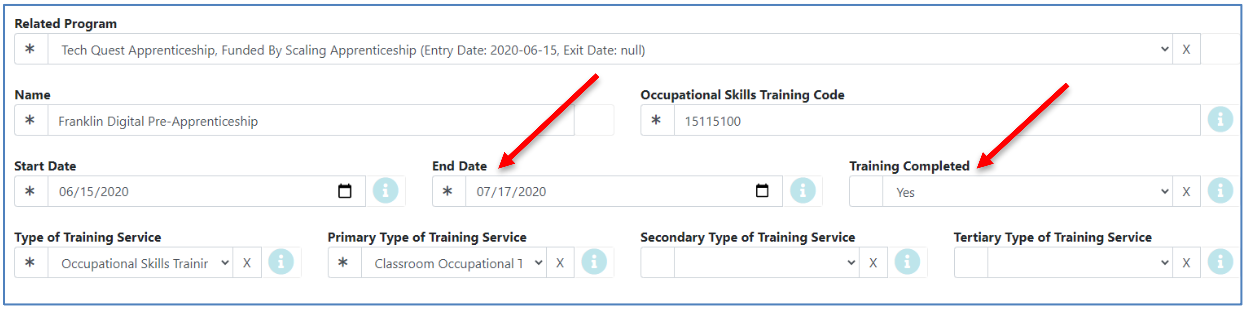
It should be noted that the employment information section in the screen (shown below) is titled “Apprenticeship Information.” This screen is **not** limited to just employment associated with an apprenticeship program but is to be used to record all participant employment information regardless if it 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.



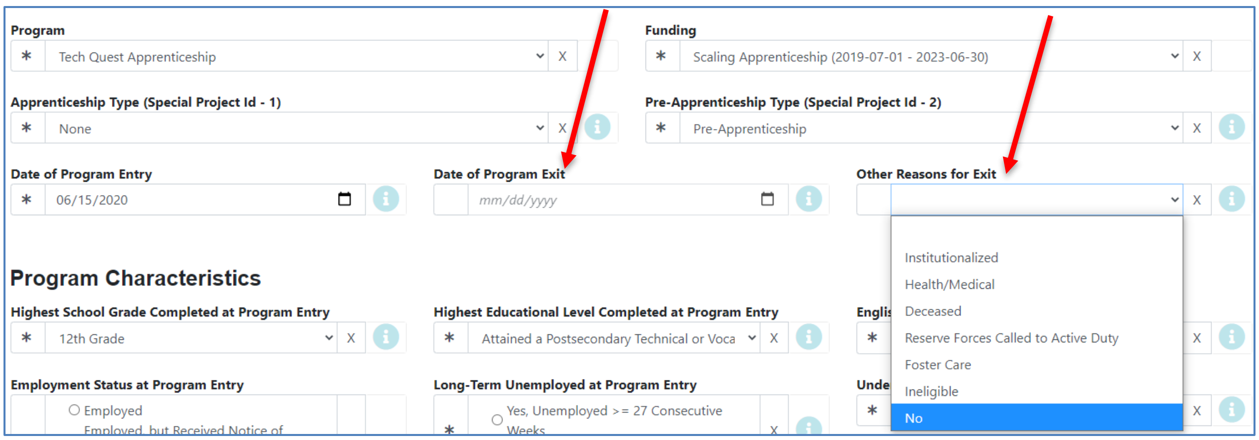
Closing a Case

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.

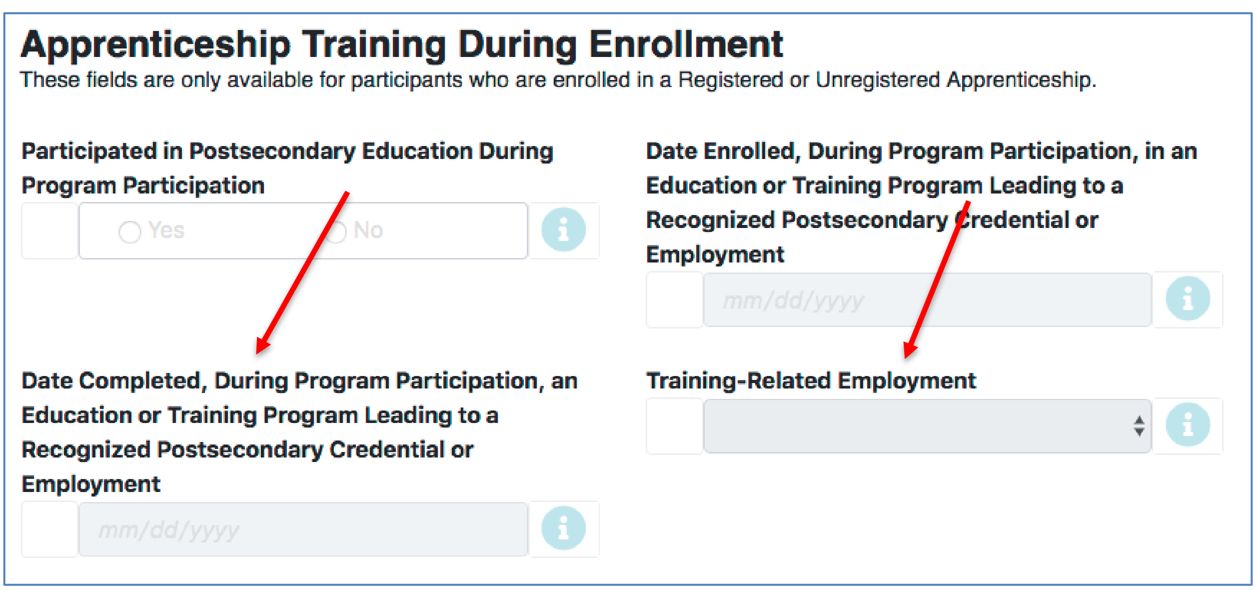




Next, return to the Program tab in the case by selecting the edit button in "Programs." To "close" the case when services are all closed and no longer needed, enter the "date of program exit" and "other reasons for exit" fields (select "no" in the latter drop down if none of the global exclusions listed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

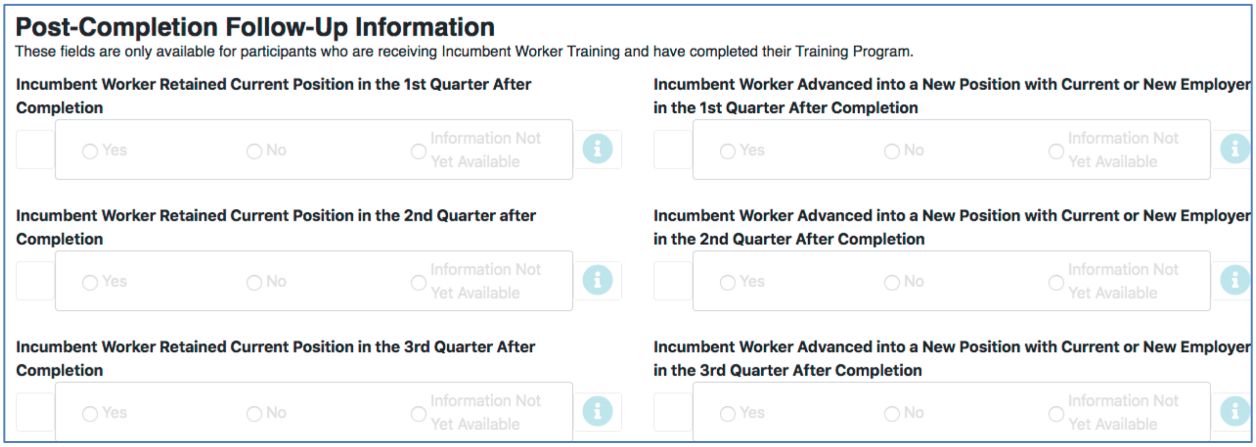


For participants enrolled in registered apprenticeships, scroll down this same page (Program page) and update the "Apprenticeship Training During Enrollment" applicable fields including: "date completed, during program participation, an education or training program leading to a credential or employment."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



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”):

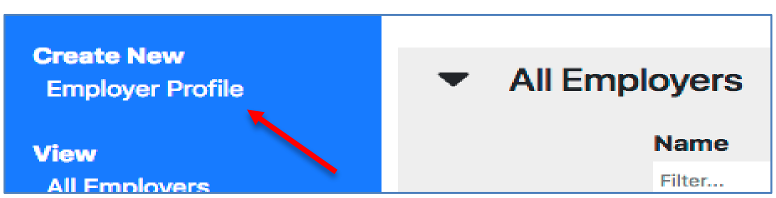


Managing Employers

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).

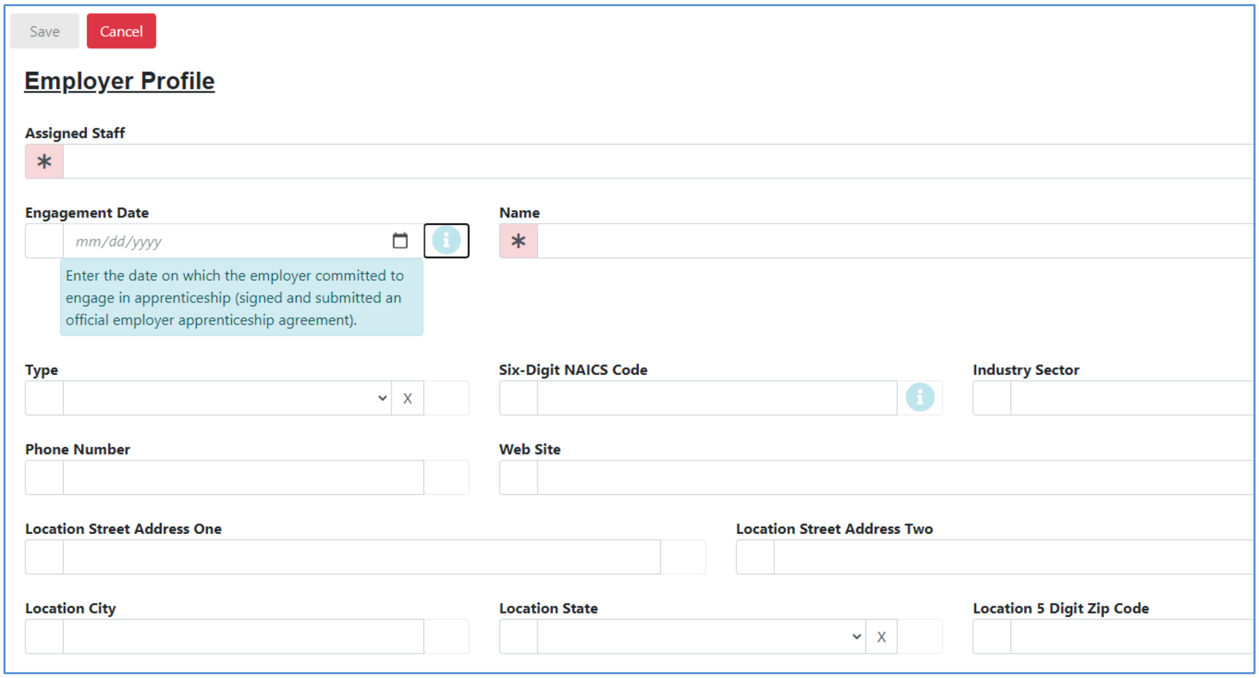
Register Employer

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.

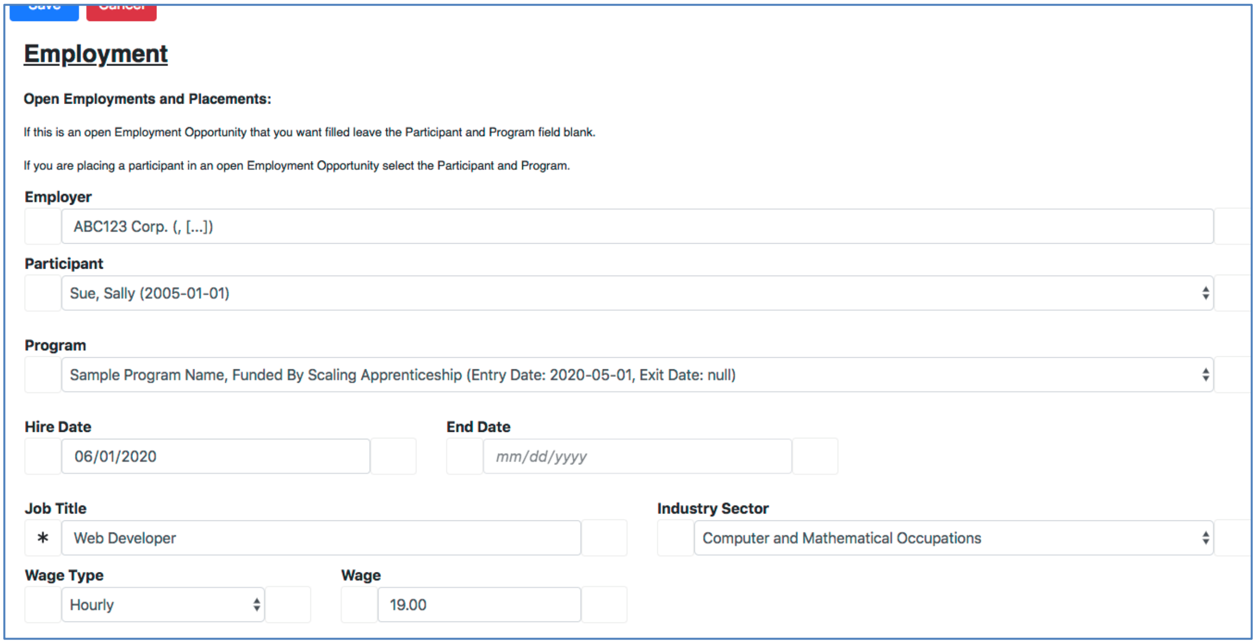
Employment Opportunities

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.

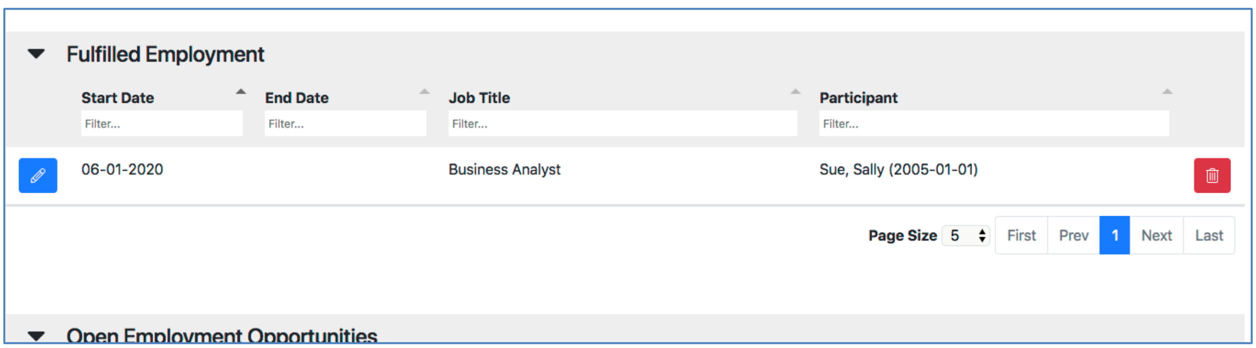
For each position the employer is hiring, create a new "employment opportunity" to show the multiple job postings. This also includes multiple openings for a single occupation (e.g. employer is hiring 3 web developers – enter three web developer employment opportunities to enter and fill the three jobs).

Filled Positions

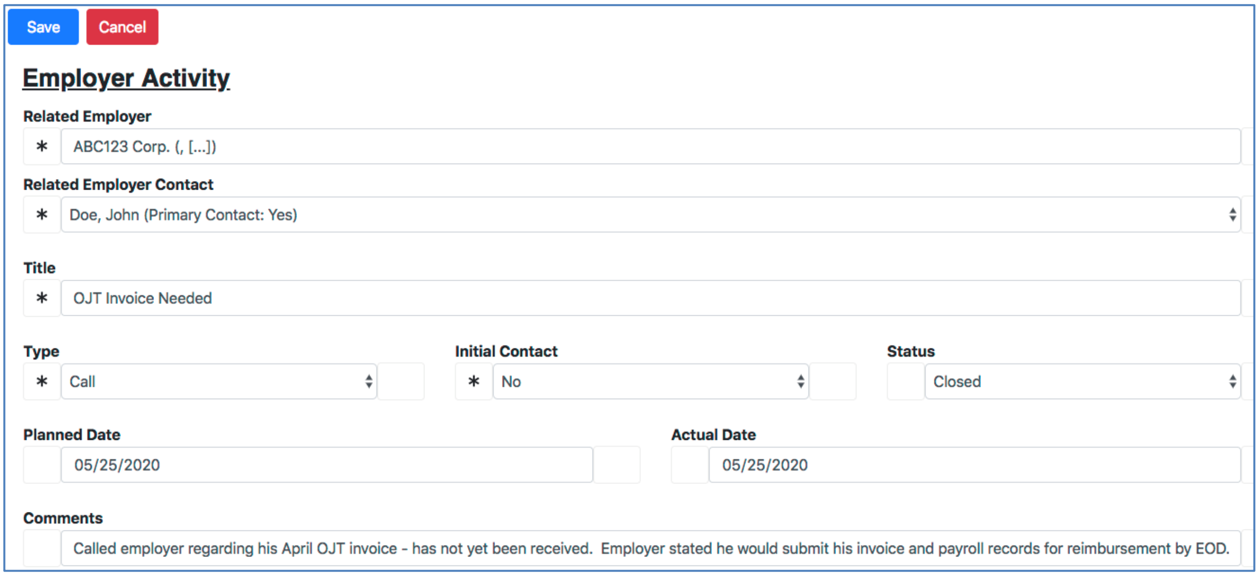
When the position is filled, select the participant name from the drop-down menu, the Program, the participant's hire (start) date, the job title, industry sector, wage type, and wage. Click "save" at the top of the screen (demonstrated below):



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.



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:



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.