

Transcript for NFJP GPMS CST Training on 03/02/2026

Presentation Timestamps

1. Session 1 – 00:02:58
2. Session 2 – 00:49:40
3. Questions Answered – 01:28:25

Transcript

00:00:03

Thank you very much for joining today.

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We're essentially going to be walking through a lot of system basics, specifically a participant entry that's going to set you up to begin using the GPMS or the Grantee Performance Management System for the DOL NFJP Career Services and Training Grant.

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Before we get too deep into the contact, let's go over a couple of things.

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Please put all of your questions in the chat.

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Now, I'm not sure how much time we're going to have today to get to the questions, but if I don't get to these questions, we're going to be bringing them to the next office hours on Monday, March 9th, or even subsequent office hours if we can't answer all of them.

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Additionally, if after this training your team wants to schedule additional training, please reach out to either of the emails that are on the slide.

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Note that the training will also depend on you and what your team needs to review.

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Before I set up that meeting, I am going to ask you specifically what you want to see and review so that we can both come prepared and we can make the most of our time together.

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So that's a really good segue on how I'm going to try to approach this training today.

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I'm going to try and lean into the content of the training, but also be very respectful of people's times.

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And so I'm going to try to maximize the time that I have with you today.

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It is 2 hours, which seems pretty long, but truthfully, it's not.

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I'm going to go and review several different scenarios on participant and reportable individual data entries, but the examples

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won't be exhausted.

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There are many other examples that I could come up with.

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And I'm sure each of you might have a, well, what happens if we do this question?

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Note that most of the training will be screenshots and sections will be highlighted to bring your attention to those sections within the screenshots.

00:02:01

The last thing we want is for me to fill out a new intake form for every time we review a different scenario.

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The way this training was designed was to sort of shoot for the middle ground.

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Some of you might seem like we're going too slow.

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And for some of you, this might seem like we're going way too fast.

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I know that this training is trying to support all audiences.

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So this really is the introduction to the GPMS system.

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It does take practice to master the system.

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Don't feel like you have to get everything right away or feel like you have to memorize all of this.

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Again, this training will be posted on Workforce GPS for you to go back to

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And we're working on a user guide, some short stories, and also know that we're here to help support you.

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And the great thing is that you guys have a sandbox which you guys can go in and practice, a very unique feature that only NFGP has.

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So please take advantage of it.

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Let's outline real quick what we're going to be reviewing today.

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I broke it up into two sessions with a 15-minute break in between.

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The first session might be a little bit longer than the second session, though.

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The first one is going to be focused on participant data entry, specifically the intake section, adding services and adding assessments.

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The second one is going to be dedicated to outcomes, follow-ups, exits, and if we have time, alerts.

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Today, we will not be going over the QPR format and the timeframes, or even logging in.

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I've spent a lot of time working with individuals and groups on logging in, so if that is something that your team needs, please reach out via e-mail so we can schedule something.

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I know that some people submitted some...

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e-mail saying that they've been deactivated or reactivated between Friday afternoon and today.

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Usually those take anywhere between 24 to 48 hours to do.

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So we haven't gotten to those yet, unfortunately.

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But again, we'll get to those when we can.

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And for those that reached out saying, I don't remember my e-mail, can you look that up for me?

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Or I need to learn how to create a user account.

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Again, we can set up a time for that.

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Additionally, everything in the system is built to support WIOA and the NFJP program.

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However, we aren't gonna go over WIOA or NFJP law or guidance specifically.

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If you have questions like, why is job search assistant under basic career services and not individualized career service?

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First, take a look at TEGL 1418 and we can absolutely get back to you, but that's not really the focus today.

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We're really gonna focus most on crucial steps for participant data entry.

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And one last note before we get started, I'm gonna be going through today as a grant admin.

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However, everything I train on can be done by all grantee roles, and when it can't be done by all grantee roles, I am gonna go through that and let you guys know when a grant admin has access to this and when they don't.

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We are still building some of the sub-grantee functions, so we are gonna have a training on sub-grantees at a later date.

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Okay, let's get started.

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First, let's go through the intake for participants.

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Imagine we've logged in.

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You're going to click on click here under NFJP.

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This will get you to the landing page.

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A couple things to take a look at here.

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At the very top in the blue banner, you're going to see your organization's name and state and the grant type.

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For this training, it's always going to be Career Services and Training.

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And it's also going to show your grant number.

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The orange box highlights days remaining.

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This shows how many days a participant has until they exit.

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If they don't have a number in the box, it means the person is still in intake status and you haven't added a qualifying service, which we call P services, or they have already been exited.

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The green box.

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around a little cloud on the right hand side allows you to download all of the cases.

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So it's basically what you see here on the screen, but in an Excel sheet.

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And lastly, the red box sort of on the top right hand side, this is the button you press when you want to add an applicant and create a case.

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After you click on add an applicant, this is a screen that's gonna pop up.

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To enroll a participant, there are five pages of information which we call the intake screens.

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If you take a look right above the red box, you'll see five different pages.

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The first page is applicant, which is where we are now.

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Going forward, know that I'm not gonna be going over every single question in each intake form, but I'm just gonna highlight a couple of areas that we've gotten questions on or just good tips for you to note.

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So first, the red box.

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This red box says any field with an asterisk next to it is mandatory and it requires user input.

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If a page contains multiple required fields, they must be filled to save or update the information.

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This just means that you have to fill in everything that has an asterisk on it.

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And if it doesn't have an asterisk on it, it means that you can move forward without filling it out.

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The blue box.

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Just sort of right underneath the red box is the first question that you're gonna need to fill in.

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Will this applicant only be a reportable individual?

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Yes or no?

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And this is what sets everything up going forward.

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The kinds of questions that will be asked, services, whether or not they have follow up, et cetera, depends on this.

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Also take note, the number in front of it, in front of that question is 941.

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For those of you that know what the PIRL is, this is the PIRL element number that the question is associated with.

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For those that do not know what the PIRL is, feel free to ask me about it after this training, and I'd love to explain to you someday.

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The orange box is economic labor market area and physical location.

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The zip code, state, and county code above that orange box is asking about where the participant resides.

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the economic and labor market area and physical location is where they're going to be receiving the first service with significant staff involvement.

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I want you to take a look at the little question mark in the blue circle.

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If you hover over it, it's gonna give you some instruction or guidance or what's needed in this box.

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So this field takes up, so this field in particular, the 104 field, takes up to 9 digits.

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The first two digits identify the state's FIP codes,

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The next three digits identify the county FIPS code, and the next four digits identify the physical location.

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These last four digits are usually affiliated to a one-stop center or their affiliates.

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Some of you have this code, some of you may not.

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If you do not know this number, just record the state and the county FIPS code.

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If you click on the little question mark for question 102, county code, it will send you to the site where you can get the state and county codes.

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If anyone ever wants to do this together, just let me know.

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A note about an element that I didn't highlight, though.

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Let's quickly take a look at the county code.

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Sometimes you can add the county code without looking it up in FIPS because you know what your county code is, and it's going to throw an error at you.

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That means that the FIPS website doesn't have it or it doesn't recognize it, but you do have a pop up that says that the it.

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I'm sorry, the pop-up is going to say that the county code does not match the state, and that's because FIPS hasn't added it in there, but you are able to click a button that says ignore, and you can move forward.

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So if you ever get an alert because something doesn't match with the state codes, just you can't ignore it because you know your county code and you can move forward.

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And sometimes this is also maybe you mistyped the county code, and that's okay, you can fix it, right?

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But you can move it and move forward.

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Lastly, the green box at the top.

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So right under view edit case information, there's a green box that says status intake 05.

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Like I said earlier, for participants, there are five pages worth of information that you need to complete for intake status.

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Each time you complete a page, it's gonna show one out of five, two out of five, three out of five, et cetera.

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Right now, it shows zero out of five, but if I fill out the first page and save it, it's gonna change to one of five.

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You can go out of order, but know that you can't move on to adding any service until you complete the intake form.

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All right.

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So I just wanted to point out that there are three different kinds of statuses up where that green box was, intake, active, and exited follow-up.

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We're gonna see all three of these statuses as we move forward today, but there are three kinds of statuses.

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Here I've highlighted a whole section, the last name of the participant and the Social Security number and the Social Security number.

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The unique individual ID

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automatically populates.

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Note that the unique individual ID is editable, but if you don't need to change it, I suggest not changing it.

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We will go over a situation on why you might need to change the identifier in a bit, but there aren't many scenarios unless your organization wants to fill in unique identifier in a certain way or with certain numbers.

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Also, if you are a participant that does not, or if your participant does not have or does not give you a Social Security number, you're just going to add nine nines to this field.

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We know that you could have a scenario where two participants have the same first name and the same last name, and neither one of them give you their Social Security numbers.

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And in that case, you would input the nine nines in the Social Security number box.

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The first participant you enter in the system will populate the unique ID using the last name and the Social Security number.

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The second will automatically generate a different unique ID, so you don't have to worry about that unless you want to change it.

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Here, I'm just highlighting that the date of birth populates the age of the participant, but as you can see, it does not populate the population, meaning are they youth

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or are they an adult participant?

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So just keep that in mind.

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The date of birth populates the age, but not the population.

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We know that youth are ages 14 to 24 and adults are 18 and over.

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So how do you determine if a participant is a youth or adult if they're between the ages of 18 and 24?

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Under program eligibility, with

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which is the second of the fifth of the five intake pages.

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As part of eligibility, you're going to decide whether the participant is a seasonal farm worker adult, migrant farm worker adult, migrant seasonal farm worker youth, dependent adult of a migrant seasonal farm worker MSFW, or dependent youth of an MSFW.

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Depending on what you select, this is going to populate the population.

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Here in the big red box, the big one, I selected seasonal farmworker adult.

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So the population of this 23-year-old is an adult.

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Right next to the red population box is the purple status box.

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And I just wanted to show you this because I did save this page.

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So now it says intake two of five.

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Right now, the way the system is built is if you fill out program eligibility and save it,

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You cannot edit it again.

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So if you move, if you save this page and you go to demographic and you say, oh man, I made a mistake right now, you cannot edit program eligibility, but we are working on a way for you guys to be able to edit program eligibility before services are provided.

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Lastly, the box all the way at the bottom, I think it's also a purple box, date of eligibility.

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The date of eligibility is what dictates when you can add services.

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The date of the first service must be the same or a later date than the date of eligibility.

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And I'm going to say that about three or four times.

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We can't provide services for a participant or even a reportable individual for that matter, unless we know that an individual is eligible.

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Now on the demographics page.

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First, the one, the box in red is number of dependents.

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Number of dependents in this family under the age of 18.

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This has to be answered.

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So if there are no dependents in the family under the age of 18, you must add a 0.

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Next, the orange box.

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I don't.

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Thank you, Olivia.

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All right, next, here we go.

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Next on the orange box, the question is highest school grade completed at program entry.

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It gives you a tip underneath the box, but just a heads up, you have to enter a number from 1 to 12.

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Lastly, I did save this page so you see the intake in the green box, three out of five under status.

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Now we're on the second to last page, WIOA and other programs.

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The first question, co-enrollment and other program services, select one.

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Note that this is an optional field.

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If you do not select anything, you have to go one by one and answer the questions.

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If you select no, none, all of the following questions will immediately fill out to be no and no will automatically be selected and they're gonna be grayed out so you can't edit them.

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If you select unknown, some questions will gray out and some questions will stay open and you still need to fill them out.

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Basically, if one of the questions has unknown to it, it's going to stay, it's going to be ungrayed, it's not going to be grayed out.

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You guys can fill that out and you have to manually put in unknown.

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But all of the questions that don't have unknown and just have no are going to be automatically grayed out and with no populated in them.

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So if they are co-enrolled, you don't want to click either one of these.

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You want to make sure you answer the questions.

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But if they are not co-enrolled, then you should click no or none, or if some of them are unknown, you would click the unknown box.

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Here's the last page of the five intake pages.

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The first question, has an initial assessment been completed?

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This must be yes to move forward.

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If you select no and you sign underneath, you won't be able to move forward.

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You can save it as a draft, but you can't complete the intake or send it to approval.

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There are three options at the bottom in the red box, so let's take a look at that more closely.

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So here are the three options.

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Save as draft means that it just saves.

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Send for approval means that it is sent to a grantee administrator for approval and they can either reject it or approve it and then complete intake.

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means that you can edit everything except the eligibility and the complete and the complete page.

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So once you complete the intake yourself, it doesn't go to the grant admin for approval.

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They are now a case in the system.

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And again, you can edit everything except eligibility and the complete page.

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All right, so this is sort, excuse me, of an example just to show you from the case screen what it looks like when you complete an intake.

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when you yourself complete an intake versus sending it for approval.

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So the very first one, case one, I completed the intake and so the intake status is 5/5.

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Porter Alex, as you can see, I can't click on that name.

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It is intake 4/5 because it went over to approval.

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The intake hasn't been completed.

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It needs to be approved before it's completed.

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But once the grant administrator

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clicks approve, then it's going to show 5/5 and you have access to that case again.

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So like I said earlier, you can skip pages, but you're not going to be able to complete an intake or even send the approval until all pages have been completed.

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And you can see that at the bottom, the send for approval and complete intake buttons have been grayed out.

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And another thing I want to point out is the orange box.

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So while you fill out the intake form, you can upload documents.

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So I know that many of these intake forms start out as paper versions or a lot of them, a lot of the questions require documentation.

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You can upload that documentation before you complete it or before you send it to approval.

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So when you do send it to your to for approval, the grant administrators might want to review the documentations associated with that individual so they have immediate access to those documents that you uploaded.

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And as you can see, right next to the documents, you can add case notes as well.

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All right, so we completed intake, hooray.

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The red box shows that you have completed all five intake pages.

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The orange box shows you a couple of new tabs, IEP, assessments and services.

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The green box shows you eligibility determination.

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Remember a couple slides ago, I showed you date of eligibility.

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This is where you can see date of eligibility.

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And remember, you can't add any services before this date.

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And lastly, the blue box.

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This is the requested date.

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This is the date that you successfully completed the intake form or it was approved by one of your grant officers.

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So now just we're going to review very quickly intake reportable individuals.

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For reportable individuals, there are only three intake pages which are highlighted in red.

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You will have to answer the first question.

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Is this applicant going to be a reportable individual or not?

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If you select yes, then only three pages will show and they are applicant, program eligibility and demographic.

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If you select no, that triggers the system to show you all 5 pages to start the process of enrolling the individual as a participant.

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When you select yes for reportable individual, the social security numbers are going to automatically be populated with the nine nines.

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Because reportable individuals are not part of the performance indicator counts, we do not need social security numbers for them.

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Remember, if you want to change or add their Social Security number for them, you can, but it's not a required.

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It's not required programmatically for reportable individuals, and that is in the in the orange boxes where the Social Security numbers are pre populated for you.

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Second page is program eligibility.

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I only want to highlight the date of eligibility here.

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Date of eligibility at the bottom will auto populate at the top under eligibility determination.

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Also, same rules for population.

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Adult or youth will populate once a farm worker status is selected.

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Remember that a reportable individual must be eligible to receive reportable individual services.

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Lastly, the demographics page.

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Reportable individuals do not have a complete page, but.

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You have to still attest that the information is correct.

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So that question that's on the complete page for participants is on the demographic page for reportable individuals.

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So now what happens if you want to convert a reportable individual to a participant?

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You will go into the application, the applicant page, click the red box where it says edit on the right hand side of the screen.

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Then this page, the first page becomes editable.

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You're going to need to update the question, the first question, 941, to no.

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You'll see in the orange box that when you do that, the three box or the three pages change to the five pages for participants.

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When you change 941 from yes to no, an error is gonna pop up at the bottom under the unique identifier that you see in the green box there.

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Basically, it's saying that there's already an individual with the same unique identifier.

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So you're going to have to edit the unique identifier.

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You don't need to make major changes to this.

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What I did, if you want to take a look at the green box, I took out two of the X's from the end and put 23.

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I didn't choose 23 for any particular reason.

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I could have changed one of the X's to a one and it would have worked.

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But after you change the unique identifier, you're going to save at the bottom.

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Once you click save, you can go back and change the unique ID again if that's what you want to do, but you don't have to.

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Just know that whenever you change a reportable individual to a participant, you go from yes to no.

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You're going to have to change that unique individual identifier.

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When you finish on the landing page under status, this individual will have updated from reportable individual under the status from reportable individual to intake 55.

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Okay, I know there are probably tons of questions in the chat, but we're gonna keep on going.

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And we are going to talk about adding services.

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Adding a service, you're gonna click on a case.

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And in this case, I selected case two, that's the name of the participant, case two from the landing page.

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This is the summary screen, and you're going to click on services, which is boxed in the red.

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Keep in mind that the eligibility determination date is captured in the summary screen.

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I've boxed that in the orange.

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So I've got two tips.

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Tip number one, we already talked about this.

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No service can be added with a start date before eligibility determination date.

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And the second, no service can be added with a start date in the future.

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As an example, today is March 2nd, 2026, but no service can be added with a date of with a date of March 3rd, 2026 or after.

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In the previous slide, eligibility determination date is 12/8/2025.

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Today, services can be added with start dates from 12/8/2025 to March 2nd, 2026.

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I'm going to talk about P service a lot, but what does a P service mean?

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But first, we've got three scenarios here that we're going to be going through.

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Adding a non P service, adding a P service with a start date, and then there are scenarios where you add P services with a start date, and they also ask for expected end dates.

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So those are the three scenarios that we're going to go through with participants.

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But first, let's talk about three dates that you're eventually going to see populated, and I'm going to highlight just in a little bit.

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Date of program entry means the recent date of the first P service added.

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Last service date is the most recent date a P service was given.

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And the auto exit date is 90 days from the last service date.

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And these will populate on their own.

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Again, what is a P service?

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I started talking about this, but I remembered it was on a different slide.

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A P service means a service that qualifies this individual to be a participant.

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These services keep your participant from exiting.

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If you add a P service and then a non-P service, the exit date is not going to update.

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A non-P service does not trigger inclusion in participation.

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I think several of you joined a call with Laura last week reviewing TEGL 1418, and that has a great chart in it where it shows you what services trigger participation and what services do not.

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If you have not seen that TEGL, I highly recommend taking a look at TEGL 1418.

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So I know that this font is very small, but what I really wanna highlight here is that under benefit types, whenever we do go into the services screen and select a kind of service, I just wanted you to see that there are some services with a P at the end of it and some without the P.

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So it's sort of, it helps you along.

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The one without a P, again, means that it's a qualifying service and a non-P is a non-qualifying service.

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Here I selected a job search assistant self-directed, a non-P service.

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I added the start date in the orange box of 1/5/2026, which is after eligibility determination.

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So it doesn't give me an error message.

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And then it automatically populated the recent date, which is in the blue box.

00:28:10

But up at the top in the green box, date of program entry did not populate.

00:28:15

Last service date did not populate and neither did auto exit date.

00:28:19

And as you can see, you're still in intake 5/5.

00:28:23

None of these populated because I did not select a P service.

00:28:29

So how does a participant become or how does an individual become a participant?

00:28:34

Here I went to services, individualized career service and selected the first benefit type career service.

00:28:42

This has a P next to it.

00:28:45

I added a start date and in both scenarios, just so you know, the last scenario and all the scenarios to come, the recent date in green will auto populate.

00:28:57

So please notice that at the top in orange, because this is a P service, the date of program entry, last service date, and auto exit date populated.

00:29:08

Remember, we talked about these dates a little bit earlier.

00:29:12

The date of program entry is always gonna be the most recent date of the first P service.

00:29:16

The last date is the most recent P service given.

00:29:21

Last service date is the most recent P service given.

00:29:23

And the auto exit date is 90 days from the last service date.

00:29:27

Don't worry, we're gonna go through live scenarios to this so you guys can see things auto populate in just a second.

00:29:33

But this is a big one.

00:29:35

Once I add a P service.

00:29:37

you're gonna see a new outcomes tab and a supportive service tab.

00:29:41

Those are highlighted in blue boxes.

00:29:43

Remember that you can't provide supportive services to someone until they become a participant.

00:29:50

All right, so I'm gonna exit out of here.

00:29:53

I'm gonna stop sharing my screen very quickly.

00:29:57

All right, so I'm gonna go into case two.

00:30:04

I'm gonna go into services.

00:30:09

And I'm going to go here, just so the overview page.

00:30:13

Once you go into services, once you give a P service, you can see a summary of the P services given.

00:30:22

Yep.

00:30:24

So I'm going to go to individualized career service, add individualized career service.

00:30:37

I'm going to select Individualized Career Service, Career Service.

00:30:50

So I'm going to capture.

00:30:53

I'm going to say that the service

00:30:55

was given February 3rd.

00:31:05

And as you can see, the most recent date automatically populated here.

00:31:09

Okay.

00:31:16

Anytime you type something in the description, because it is a requirement, you have to tap out of it, tap outside of the box, and then you can save and close.

00:31:32

While this is loading, for this benefit type, it has a start date and a recent date, right?

00:31:37

It doesn't have an end date for this particular service.

00:31:40

Some services do have end dates, and we're going to go over an example with one of those in a second.

00:31:45

But it is possible that you guys give them that same service multiple times.

00:31:53

So do you update the recent date, or do you go ahead and add the benefit type again?

00:32:01

WIPs, the reason that we always focus on the recent date is because WIPs is only going to be looking for the most recent date.

00:32:10

However, for FPO monitoring and for record-keeping purposes, it is best practice that you add that one-time service again.

00:32:19

So, as you can see...

00:32:21

I added this career services.

00:32:23

There's career services two times in here.

00:32:26

I could add it again.

00:32:27

And just so you know, once you go into individualized career service or if you go under basic career service and you scroll down, you can see the history, the service history here.

00:32:36

Now I'm going to show you that you can go in and update this service.

00:32:42

I'm going to scroll down and I can change this most recent date.

00:32:46

I'm going to change it to the 5th.

00:32:50

And now I'm going to save that.

00:32:56

So now I'm going to scroll down.

00:32:57

Here in history, and even if I go into the summary page, I'm going to see that there is a start.

00:33:05

I gave it one time on the 2nd and another time on the 3rd and then on the 5th.

00:33:09

But what happens when I'm going to go in, back to individualize, I'm going to go back to the service and I'm going to update it.

00:33:22

I'm going to do the 6th now.

00:33:24

I know that sometimes it's not going to be so back-to-back, right?

00:33:27

There'll be times in between, but I want to show you guys the timing here.

00:33:30

And I want to see, I want to show you what we see or what even the FPOs see if they go into the system or if they want to see the system.

00:33:38

Here, I'm going to go back to the summate.

00:33:40

The last service date did populate again to the 6th.

00:33:44

Here, I see 2-2, 2-3, and 2-6.

00:33:48

But what happened to the 2/5 service date?

00:33:51

I don't see it anymore in here.

00:33:53

It was replaced by 2/6.

00:33:56

So for these services where really it's, you know, you provide it one time and then you can provide it again, we do encourage you guys to go in and add those services each time you provide them.

00:34:13

All right, so now I'm gonna show you a different kind of service.

00:34:19

I'm gonna show you a service that has a start date, the recent date and an expected end date.

00:34:30

So I'm gonna go into this is case four.

00:34:33

You can see I already did intake 5 out of five.

00:34:37

I completed it.

00:34:39

I'm gonna go into services.

00:34:43

We go into individualized career service.

00:34:45

I'm going to add an individualized career service, and this time I'm going to select a work experience.

00:34:51

There are different kinds of benefit types under work experience, and as you can see, there's a start date, an expected end date, a recent date, and then an actual end date.

00:35:05

I'm going to go ahead and select job shadowing.

00:35:11

I'm going to begin the start date.

00:35:15

as let me go February 24th.

00:35:23

The recent date automatically populated is job shadowing.

00:35:28

I'm going to say that it only lasts a couple days.

00:35:31

I know this is not realistic for everybody, but I just want to give you an example.

00:35:35

I'm going to click on the expected end date of the 27th.

00:35:39

OK.

00:35:41

So right now there is no actual end date yet.

00:35:44

We're still, you know, the participant, you add actual end date once the participant has actually finished the job shadowing or the benefit type.

00:35:52

So I'm going to save and close.

00:35:59

So this was actually the first P service that I added for this participant.

00:36:03

The date of program entry updated, the last service date updated, and the auto exit date updated.

00:36:09

I'm going to go back in.

00:36:10

Job shadowing isn't a one-time service.

00:36:13

There's a start date and there's an end date.

00:36:15

Here we can see the start date, but then the most recent date too.

00:36:19

Now, let's pretend if this service was 100 days in length.

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If you don't update the recent date, it will automatically exit this participant in 90 days.

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So what you want to do is go in,

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And each one of your organizations is gonna have a touch base with those individuals that's different.

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So just make sure that you all get on board on how often you're reaching out to these participants.

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They're going to be in services that are longer or, you know, they're longer than a one-time touch base.

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They're in it for a week or a month or five months.

00:36:56

Make sure that you guys are on the same page on how often you're reaching out to the grantee or to the participant, I'm sorry.

00:37:02

So we're going to pretend, I know that this was only a couple days in length, but we're going to pretend that this is 100 days.

00:37:07

And after the first month, you're going to come back and you're going to make sure that you put in that you did check in with that participant, right?

00:37:14

You're going to select on the update button and you're going to come here and you're going to change the expected end date.

00:37:22

So here we see the last service date is the 24th.

00:37:27

I'm sorry, the recent date, not the expected end date.

00:37:29

The recent date is the 24th.

00:37:31

We're gonna come in here and we're gonna update this to the 25th.

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We're gonna pretend a month went by, but for this purpose, just a day went by.

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So I clicked on the recent date and I saved it.

00:37:47

And here the date of program entry, which is when I first, when we first gave them a piece of service in the platform is,

00:37:55

The 24th, but I checked in a month later.

00:37:58

So it updated to 225, which is really a day later in these purposes.

00:38:03

Now the participant has finished.

00:38:06

You're going to want to go in here.

00:38:08

Click update.

00:38:12

And we're going to go to.

00:38:14

Recent end date.

00:38:16

We're going to click on the 27th because they did.

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If they completed earlier, you can click.

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Let's pretend they.

00:38:23

they finished or they withdrew from the training on the 26th, you can update the most recent date.

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And if they finished, you can update the actual end date to February 26th.

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This, the last service date is gonna be the 26th.

00:38:43

However, for these purposes, the participant did end on the 27th.

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I'm gonna change here, change that.

00:38:55

And I have to update the actual end date to this 27th.

00:39:00

Now, because I put an actual end date here, actual total hours worked became a required field.

00:39:09

OK, so I have to now that the participant is done with the training, maybe even if they if they withdrew, they left early, you have to record the actual total hours worked.

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I'm just going to put four here for these purposes and then I'm going to save.

00:39:35

It's taking a little while today.

00:39:37

I think that there are a lot of people in the sandbox right now, which is great news, but because of that, the system is acting a little slower than it normally does today.

00:40:01

While this loads, I just want to let you guys know I understand that there are an infinite amount of scenarios that we can go through here.

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If this low, if this speeds up just a little bit for me, I would like to go through basic career service, individualized career service.

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We're going to go over training and education just to show you guys what is in each one of these.

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But if we can't get to it, please

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go into the sandbox, play around, just click these buttons, see what it shows you, see what the drop downs are.

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Again, all of the benefit types and whether it's a P service or non P service, you guys can see in Tegal 1418.

00:40:44

But I hope that this works for me, and if it doesn't, go back to the PowerPoint.

00:40:50

Once this uploads, if it uploads, you're going to see this last service date change to 2/27/2026, and the auto exit date will change after that as well to 90 days from the last service date.

00:41:07

And here, just so none of these have P services because the larger heading, work experience, has a P next to it, which means once you select that, it has a P on it.

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All of the services underneath that are P services.

00:41:21

So here we go.

00:41:22

The last service date changed to 2/27.

00:41:25

So I'm going to go through very quickly.

00:41:29

Here's basic career service.

00:41:40

This might be too slow for me today, guys, and I don't want to sit here and just wait for things to load.

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So because it's taking forever, I'm going to stop sharing my screen and go back to the PowerPoint.

00:41:54

What this was supposed to go through really was about you guys seeing how the service dates at the top populated.

00:42:02

'cause that really is what we want to understand.

00:42:05

When is the participant going to exit?

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Maybe you guys need to do follow up and really understand that for a participant to be a participant, there needs to be services P services in the system within 90 days.

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Otherwise they will exit.

00:42:21

OK, so now we are back in the services screen and I just wanted to go to the training screen.

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Here, I want to point out that on the job training or OJT funded by 167 grant, know that 167 grant is NFJP.

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OK, so we're actually adding that in the system because I know not everybody knows what 167 grant means.

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167 is the section in the Workforce and Innovation and Opportunity Act that is that it's under.

00:42:58

So it's under Section 167.

00:43:01

And just so you know, for training, most of these RP services, so it will extend your date of exit.

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And here you have an option to say that yes, they completed it, or no, they did not complete, or they withdrew.

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But once they do complete, you have to add the date or the date from when they withdrew from the training.

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You also can type in a training provider.

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We are working on functionality right now where you can add different trainings and you can automatically select it.

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And so if several case managers are uploading the same information for the same training, you'll be able to all select the same training and you guys won't have to go in and type it in manually every single time.

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And it'll be consistent amongst all case managers and the same for a service provider.

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Here, we already have built in that service provider functionality

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you can add a service provider.

00:44:00

And if we have time, I can show you the screen on where the service providers are listed.

00:44:04

But basically you add the service provider and this becomes a drop down and you can add a service provider.

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That way, whenever we're analyzing or you guys are analyzing your data and you see, you know, what was a service provider across the board for all these participants, it's all gonna be consistent.

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No one's, you know, whenever a system sees, for example, Walmart,

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There's Walmart Inc.

00:44:26

There's Walmart Inc with a period.

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And all of those are actually different service providers because they're all spelled a little bit differently.

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So being able to add service providers or the training names or education providers will give it more consistency across the board.

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Next, we're going into education.

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So these are going to be asking

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Did they participate in a post-secondary education program during the program?

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So this is really about, did you guys provide the education service?

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Under services, we're gonna go through education and there's an education tab in services, in outcomes, and in follow-up.

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The differences here are education being provided in services means that it's part of the program, or if they are placed, but you're still giving them or they are

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in an education program, but it's not part of your services, it can count as an outcome because they're in education.

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However, they're still being provided services, but you guys are not the ones that are providing the service.

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So here we saw this earlier as an overview of the P services.

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This is gonna show the most recent date of the summary for the P services.

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So even though job search assistance, let's say self-assisted, is you guys gave it to them

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three times, four times, it's only going to show the most recent date.

00:46:02

All right, so now services for reportable individuals.

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This is a slightly different.

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For reportable individuals, immediately after completing the intake form, the last service date is populated from the eligibility determination.

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So if you can see in the second box, the one at the bottom, the red

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Most recent services eligibility determination has a start date of 2/1/2026.

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That automatically populated in the eligibility determination box up at the top.

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The last service date is 2/1/2026 and the auto exit date is 5/2/2026.

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Participants have many different kinds of services.

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like basic career training, individualized career training like we just saw, training, education.

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But for reportable individuals, there are only two types, basic career services and related assistance.

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For this example, I selected basic career service.

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As you can see, there are no P services.

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I add a start date and the most recent date does populate.

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So the last service date, once I added job search assistant self-directed, went from 2/1/2026 to 2/3/2026.

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So the auto exit date went from 5/2/2026 to 5/4/2026.

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None of the reportable individual services have expected end dates, like the participants.

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So just like with the participants, it's best practice to enter each service separately instead of extending the recent date for a single service.

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But again, this is just about best practice, and it's so we or the FPOs can see all the services that you've provided for that individual.

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The basic career service and related assistance are shown under the services tab.

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So I don't think we have time to go over that right now, but I'm gonna go through a couple more slides and if we do, then we can go back to the lab system and see if it'll upload for us.

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I just wanted to show you guys the drop down and what the different options are between basic career services and related assistance.

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So now assessments.

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So here you would click assessments

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As you can see here in red, only assessment number one is gonna be submitted to WIPS.

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The second and the third are not gonna be submitted.

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Something else to keep in mind, that recording assessments will not change an exit date, even if it's one of the most recent services.

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It's a non-P service.

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Assessments are not P services, so keep that in mind.

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It does not change the exit date.

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I also wanna point out that if the post-test is higher than the pre-test,

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These are technically EFL gains.

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Why does that matter?

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Because an EFL gain is a type of measurable skill gain.

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However, this is going to make more sense when we go through MSGs, but I wanted to let you know that these screens are not connected.

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An EFL gain in the assessment tab is not captured in the measurable skill gain section.

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So if there is a gain in the assessment, please go to the outcomes tab for MSGs, which we're gonna go over in the next section.

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And there are five types of MSGs, but type one is for EFL gains.

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So you would go separately to make sure that you record that in that section, okay?

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So just know, assessment tabs are not connected to the MSG tabs.

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So session two, we're gonna go over outcomes, follow-ups, exits, and alerts.

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All right, outcomes, and this for outcomes is only for participants.

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It is not for reportable individuals.

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I want you guys to take at all the different kinds of outcomes or the kinds of tabs that are under the outcomes field.

00:50:04

We've got employment and education in the red box.

00:50:08

measurable skill gains and credential attainment in the orange box, exit in the green box, and deleted outcomes in, I think that's a little blue box, a dark blue box.

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Maybe a black box.

00:50:23

I want you guys to take a look at measurable skill gains and credential attainment.

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Measurable skill gain and credential attainment are performance indicators.

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Measurable skill gains and credential attainment are performance indicators, and they can be achieved while they're in the program.

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There are other performance indicators, the rest of the five, which is placement in quarter two and placement in quarter four, median earnings,

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And I'm sorry, the 6th one is effectiveness in serving employers.

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Those are all collected during follow-up.

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However, measurable skill gains and credential attainments can be achieved during program participation.

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Now, I said, I think earlier that we're not going to go over any WIOA guidance, which we're not really.

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Someday we're going to have an in-depth discussion on WIOA performance indicators.

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But today, we're just going to go over how to capture that data in the system.

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So in the outcomes tab,

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If they receive a measurable skill gain or credential attainment, these are connected to your performance indicators for WIOA.

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Employment and education, these are not connected to performance indicators.

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Remember that employment, a participant can be placed in employment, and we look at Q2 and Q4 placement after they exit for both adult and youth.

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For, or yeah, for both adult and youth.

00:51:49

For education,

00:51:51

We capture placement in Q2 and Q4, especially if they're youth, but not if they're adults.

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We don't catch education placements after exit for adults.

00:52:01

It's not part of the performance indicator.

00:52:03

But I wanted you guys to know that in the outcomes tab, employment and education is not part of the performance indicators.

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Measurable skill gain and credential attainment are, and we're gonna go through exits and deleted outcomes in just a little while.

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But this is what is in the outcomes field.

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So the outcomes tab, yep, I just said this.

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Employment in the outcomes tab does not count towards performance indicators.

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Education in the outcomes tab does not count towards any performance indicators.

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Measurable skill gains in the outcomes tab does count towards MSG indicator.

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And the credential attainment in the outcomes tab does count towards credential indicator.

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Now, earlier I talked about education.

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You see education and services, you see education and outcome, and you could see education and follow-up for youth.

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Education and services means you, the organization, are providing or paying for that service.

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Education and outcomes means that participants are in an education program, but they're not part of your services.

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You guys aren't paying for them, but you guys are still providing peace services, and they haven't exited.

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Or you can also record if an adult has exited the program, you know, during quarter one, two, three, four, and they're in an education program because education for adults do not count for performance indicators.

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And then education and follow up.

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So you're gonna see a little tab in the Q2 and Q4 follow up if they were placed in education.

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And this is only recorded for youth, okay?

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Again, I know that there could be a ton to go over when it comes to performance indicators.

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We'll do that at a later date, but we have to highlight it here.

00:53:51

All right.

00:53:52

This is what the employment screen looks at.

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Everything is pretty straightforward.

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We're not going to go through all of this one by one or anything.

00:54:01

I just want to show you guys what the employment screen looks like.

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Type of placement, just so you guys know, full-time, part-time, please take a look at the little question mark, but this is really important information for us.

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And then we're gonna go to the educations tab.

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You're gonna see a lot of questions in the outcomes tab that are very similar to the questions that are asked in services.

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But again, they're sort of capturing this at two different times, right?

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You're still wanting to answer the questions.

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It's the same questions, but they're being captured in sort of two different ways.

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And in services is when you guys provide the service or you guys are paying for the education, outcomes is whenever they're doing it on their own.

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they're still in your program.

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So again, the questions are the same, but they are being provided at different times.

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And this education program name and the provider, especially the provider here, we've already added this tab where you guys can add the provider and then anyone that goes in, you can select the provider, the education provider, just that way it's consistent throughout the board.

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And so if someone is at the local community college,

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You guys spell that community college's name the same way every single time.

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So now we're gonna go through deleting outcomes.

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When you add an outcome here, you add it, you can save and close, save and add another down here if you see it on the bottom.

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Those are not activated.

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Neither one of those are activated unless of course you answer every single required question that has an asterisk on it.

00:55:44

But once you do, let's say for some reason you confused 2 participants while you were doing participant data entry and you weren't supposed to add a training or an education outcome.

00:55:57

And so you can delete that.

00:56:00

You can delete that outcome in here now.

00:56:04

Unfortunately, right now you can only view, update, or delete employment and education outcomes.

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You cannot update, delete measurable skill gains or credential attainments.

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We do have stricter rules on those since those are performance indicators.

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But for employment and education, just know that you can modify the little

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on the left hand is just to view it.

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The little pen in the middle is to edit it, and then deleting is to delete it.

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You can delete this outcome.

00:56:42

Yeah.

00:56:46

Once you delete it, once you click on delete, then it takes you to this page.

00:56:53

and it's gonna ask you why, why you're deleting it, and then you delete it.

00:57:01

You can go under the deleted outcomes tab.

00:57:04

So under outcomes, remember we went over employment, education, measurable skill gains, credential attainment, exit, deleted outcomes.

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Once you delete an outcome, it will show up here.

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Grant administrators, you will have access to everyone's deleted outcomes.

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So if any case manager or any supervisor deletes an outcome in the system, you're going to be able to see a list of deleted outcomes so that maybe if you want, you can follow up with them.

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But just know that anytime you delete an employment or education outcome, it will be listed in the deleted outcomes tab.

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And it will show who it was deleted by, when, and the reason.

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All right, so we're talking a lot about performance indicators and I'm about to go through some of the performance indicators, specifically measurable skill gains and credential attainment since they're under the outcomes tab.

00:57:59

However, if you have questions about definitions or how things are captured, please see TGL 1016 change three.

00:58:09

All right, so for measurable skill gains, you click on the outcomes tab, go to MSG and add an MSG.

00:58:19

I really wanted to show you guys this in the live system, but it is slow today.

00:58:23

So I'm just gonna show you guys here.

00:58:26

And here, I'm sorry, I said earlier that you couldn't delete it, but yes, you can delete it.

00:58:30

If you look at the very bottom, oh, I'm sorry, measurable skill gain outcomes at the bottom, you can view it, you can update it, or you can delete it.

00:58:39

You would click on the measurable skill gain type.

00:58:41

You add when it was gained,

00:58:45

And then if you would like a little, a little note and then save and add another or save and close.

00:58:52

Oh, and just as a heads up, employment and education outcomes, measurable skill gains and credential attainment outcomes do not qualify as P services.

00:59:02

Just so you know, this is just whenever we gather the information of things that are happening, the outcomes that are that are going on, but those are not P services, the trainings, you know, leading up the services leading up to measurable skill gains,

00:59:15

services leading up to credential attainments, those are captured as P service.

00:59:19

But once a measurable skill gain is achieved, or once a credential attainment is achieved, those are not P services.

00:59:27

These are the outcomes.

00:59:31

And remember, for measurable skill gains,

00:59:34

In assessments, you can track the pre and post test.

00:59:37

However, even if it shows a gain, it's not going to be captured here unless you add it yourself.

00:59:43

So you would have to click on measurable skill gain, measurable skill type, I'm sorry, and then click the type number one and just make sure that you add when that was gained.

00:59:59

All right, and this is just sort of the dropdown for the measurable skill gain type.

01:00:04

So I did select it, I took a screenshot of it, and these are all the different types of measurable skill types.

01:00:11

Education functioning level, post-secondary transcript report card, secondary transcript report card, training milestone and skills progression.

01:00:25

Now credential attainment.

01:00:30

This is what the credential attainment screen

01:00:33

looks like, you add all the required fields, and then you save it and you move forward.

01:00:39

However, I really want us to focus very quickly on secondary school diploma or equivalency.

01:00:47

This type one right here, secondary school or diploma, all of these, the moment you select these, it is a credential attainment once you input all the information.

01:00:57

However, for secondary school diploma, it's a little different.

01:01:02

Remember that for credential attainment, a participant who has attained a secondary school diploma or its recognized equivalent is included in the percentage of participants who have attained a secondary school diploma or its recognized equivalent only if the participant is also employed or is enrolled in an education or training program leading to a recognized post-secondary credential within one year after exit from the program.

01:01:30

So what does this mean in plain terms?

01:01:33

Secondary school diplomas or equivalency immediately can count as an MSG.

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However, it doesn't count as an MSG and a credential immediately.

01:01:42

If they achieve a secondary school diploma or equivalency and they exit the program, they have to be

01:01:50

an employment or post-secondary program within the year after they exit from the program.

01:01:57

When they do that, and the way that you capture that is in the follow-up, right?

01:02:02

If you capture that in the follow-up screen, which we'll go through in a little bit, then whenever that secondary school diploma or equivalency that you captured in credential attainment will basically be triggered.

01:02:13

And that secondary school diploma equivalency counts as a credential as well, but it is not captured as a credential

01:02:19

the moment they receive the secondary school diploma equivalency.

01:02:22

They have to be in employment or education or training the year after exit, sometime within the year after exit from the program.

01:02:34

All right, now we are going to move over to follow-ups.

01:02:42

And for follow-ups, I was supposed to go into GPMS.

01:02:47

Let's see.

01:02:48

Can you all see my GPMS screen?

01:02:51

Can y'all give me a thumbs up?

01:02:54

Becky, I see your great.

01:02:57

I see your question.

01:02:57

Can a deletion be restored or would it have to be reentered?

01:03:00

It would have to be reentered, Becky.

01:03:02

Once you delete it, it is deleted.

01:03:06

All right, so I'm gonna go to cases.

01:03:11

Access denied.

01:03:12

That is so fun for us.

01:03:15

I do think that this is worth going over.

01:03:18

If for some reason I can't get to it today, we will definitely go through it at the next office hours, but I'm going to try.

01:03:28

Well, the site is temporarily unavailable.

01:03:31

What this means is not that there's too many people, it means that they are maintaining the system on the back end.

01:03:37

So luckily I did do screenshots for everything else.

01:03:42

We're going to keep moving forward here.

01:03:45

All right, we're gonna go, we're gonna start talking about exits.

01:03:49

And although this isn't really deleting an exit, we're gonna be first talking about deleting case records.

01:03:54

It just kind of fit nicely under the exit buckets.

01:03:57

So deleting a case record is not the same thing as deleting a participant.

01:04:04

So, or I'm sorry, deleting case records can't, you can delete a case record if it's an intake 5/5.

01:04:12

If you add a non P service,

01:04:14

you can still delete the case record or update them to be a reportable individual.

01:04:20

But if you add a P service, you cannot delete the case record and you can't change the participant status to reportable individual.

01:04:27

I don't think I have said this yet, and maybe I did in passing, but a participant, once you add a P service, you cannot change them to be reportable individuals.

01:04:35

You can change a reportable individual to become a participant, but it can't be a participant to a reportable individual.

01:04:42

So if you are.

01:04:45

in intake status and no P services have been getting have been given.

01:04:49

And again, we know human error happens.

01:04:52

It happens to everyone.

01:04:53

And I see this all the time in our other GPMS systems where you're adding in, but it's a wrong case record for the wrong grant or the wrong grant type or something that can happen, especially for those of you that have housing and maybe a CST.

01:05:08

Just know that you can delete a case record if it's in intake status.

01:05:14

So what do you do?

01:05:15

You go into the admin tab.

01:05:17

You can see the little red box next to cases.

01:05:23

Then you will go to delete case records.

01:05:26

And then you can select participants and you're going to click next.

01:05:35

See all of these, the status for all of these are all in 55152535, et cetera.

01:05:43

No P services have been given.

01:05:48

And then you can hit delete.

01:05:53

And then it will say selected cases have been deleted successfully.

01:05:56

Please click on the back button below to redirect the case to the cases page to verify.

01:06:02

Then you would basically go back in to the cases screen and just make sure that they're not there.

01:06:06

OK, so you can delete case records as long as no P service has been given.

01:06:14

And you know what?

01:06:14

I wanted to give a shout out real quick to Roy Campos.

01:06:18

He did ask this question or a similar question at the last office hours.

01:06:23

So I was really hoping to clear some of that up for you, Roy, that as long as a P service is not given, if it was entered in error, you can delete the case record.

01:06:33

If not, you can change them to a reportable individual.

01:06:40

So exits.

01:06:42

We're gonna focus on other reasons for exits.

01:06:45

What is other reasons for exits?

01:06:48

Whenever you provide somebody a P service, and let's say they leave the program, you can't just delete them from the system, like I showed you.

01:06:58

Once you provide a P service, you can't just delete that participant from the system.

01:07:02

The only reason why they would be taken out, and we have very specific steps to go through, which we're going through right now, the only reasons

01:07:12

that somebody could be taken out of the program and it would not affect your performance indicators are for these reasons listed here.

01:07:21

Institutionalized, which for us includes incarceration, health or medical reasons, deceased, foster care, reserve forces called active duty, or they're ineligible.

01:07:34

And we're going to go through what some of these means at an office hour from a more policy outlook and view.

01:07:41

But for right now, these are the only reasons why they can exit the program, basically meaning not only do they exit the program ahead of schedule, but they are taken out of the denominator.

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They're not going to be counted towards the performance indicators.

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That's very important because if a participant exits the program,

01:07:59

but it's because they didn't want to be in the program anymore or something happened, if they don't fall under one of these reasons, they're going to stay in the denominator.

01:08:08

They will still be part of the performance indicators.

01:08:11

The only way you can take them out of the performance indicators is if they have other reasons for exit.

01:08:18

So when can you exit a participant for other reasons?

01:08:21

When a participant is active and they leave a program for any of the reasons shown above, or if a participant auto exits,

01:08:29

because the case record was not completed in time, you can go back in and modify the exit, meaning you can give them the other reasons for exit, right?

01:08:38

You can't just exit A participant.

01:08:41

Exiting A participant is after 90 days, but you can't manually exit A participant.

01:08:46

However, if they are already exited, but you forgot to update some case records, we're gonna go into that in just a little bit.

01:08:54

You can modify, you can't update, but

01:08:57

If you need to add other reasons for exit and the participant has exited, you can modify their exit and include one of the reasons.

01:09:05

So I'm going to show you how to do that.

01:09:12

So this participant is active.

01:09:14

You go into the outcomes tab and you click exit.

01:09:19

Then.

01:09:20

You go into, it says if a participant exited already, to modify the exit information, click modify exit.

01:09:27

That's the first red rectangle that you see on the screen.

01:09:31

And below it, exit participant in the blue tab, you would click on that.

01:09:37

You would select other reasons for exit.

01:09:40

As you can see, there is the date of program entry, 2/24.

01:09:45

The exit date has to be after 2/24.

01:09:49

It can't be before.

01:09:51

You add the exit date, you add the other reason for exit.

01:09:54

There's a couple of other required questions on the screen that you have to answer.

01:09:59

And then you would click on the submit button that I don't have a box over, but click on submit.

01:10:06

And so then it captures it.

01:10:07

went from active to exited and follow up immediately.

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And you see down here the category of exit and why they were exited.

01:10:14

Now, if you look at the definition in the PIRL, I talked about the PIRL earlier.

01:10:18

For those of you that really understand the PIRL, if you look at the PIRL and you look at other reasons for exit, you'll see that there is an incarceration selection.

01:10:27

However, that is only reserved for our re-entry programs here under WIOA, for here at the Department of Labor.

01:10:35

So we do not add that to the list.

01:10:38

We capture incarceration under institutionalized.

01:10:42

So I get questions on that all the time.

01:10:45

But yes, it's under institutionalized.

01:10:50

And then just so you know, if for some reason you clicked institutionalized, but it should have been health or medical reasons, you can go back, you can go to modify exit again, and you can make that change.

01:11:04

All right, so now deleting an exit.

01:11:09

Deleting an exit is not the same as deleting a case record.

01:11:15

Sorry, before I move on, Lorena says, what if they just don't want to continue?

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They don't wanna continue.

01:11:20

They don't wanna continue, but they still are part of your denominator count.

01:11:24

You can't exit them manually.

01:11:26

You're gonna have to wait.

01:11:27

If you've provided them a P service, you're gonna have to wait until they're auto exited and they are part of your participant count.

01:11:35

So sorry, back to deleting and exit.

01:11:37

Deleting and exit is not the same as deleting a case record, which we saw earlier.

01:11:42

You can only delete an exit if the participant has exited.

01:11:45

That's kind of obvious, right?

01:11:47

Once you delete an exit, a grant admin does have to approve.

01:11:53

Once it's approved, you need to enter services that day.

01:11:57

that day that they enter to either update the records or keep the record active so it won't exit the participant overnight.

01:12:04

Now, sometimes you're going to add those records because you know it was an oversight.

01:12:09

The services weren't input correctly or at the right time.

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So you guys went in, you input those services, but those services were given more than 90 days ago.

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So even whenever you enter it the next day, you're still going to see an exited participant, but this time with updated services.

01:12:26

Or

01:12:27

You can go back in and that participant is still active.

01:12:30

You guys have been giving services, y'all just haven't been recording them.

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So you input the services that you need and you'll see that when you come back, if it's within the 90 days, then they will be active.

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I wanna also say if you provide a participant a service and then you don't provide a participant another service, another P service, let's, I'm gonna be clear about that, a P service for 90 days,

01:12:56

you have to re-enroll that participant.

01:12:59

They're going to be in the system two times.

01:13:02

So you cannot, after 90 days, add a P service to the same record.

01:13:08

because more than 90 days have passed.

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You're gonna have to re-enroll them and to re-enroll them means that you have to make sure that they are eligible for participation again.

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You have to go through the whole thing, the assessment, the intake forms, eligibility criteria, all of it.

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They basically start from the beginning.

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So there is a timeline, right?

01:13:28

When a participant or an individual comes to you, you enroll them in the program, you provide them a peace service.

01:13:35

So to keep them active, you have to continue providing P services.

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That's why we went through what it means to update those services, whether it's the recent dates or whether it's adding those services, you know, on a continuous basis.

01:13:49

And I put here organization GPMS policies and procedures, and that really is to encapsulate everything.

01:13:56

Yes.

01:13:57

make sure that your organization has GPMS policies and procedures for exiting.

01:14:01

Because like I said, someone will go through to delete that exit and it goes to the grant admin.

01:14:07

And then once the grant admin approves, you guys basically have 24 hours or until the next day to input services before it exits again.

01:14:15

So talk with your grant admins.

01:14:17

Grant admins, you want to know how often are you guys going to be approving those exits.

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Is it every morning?

01:14:24

or reviewing, maybe not approving, but you're going to be approving those every morning, every Monday, Wednesday, every Friday.

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I don't suggest Fridays because overnight they'll exit them again.

01:14:37

So just make sure that you guys understand that.

01:14:40

And, you know, organization GPMS policies and procedures is also about capturing things like when.

01:14:48

If a participant is in your program, how often are you reaching out to them to provide those P services, right?

01:14:54

So it shouldn't be maybe a case manager by case manager.

01:14:58

An organization should have a stance on if they are doing a job shadowing which lasts 100 days, which that was an example we saw earlier.

01:15:07

Are you guys reaching out to that person while they're in their job shadowing?

01:15:11

Are you guys reaching out to them every month, every two months?

01:15:16

What is that limit?

01:15:18

And are you guys providing other P services on top of that job shadowing during that time?

01:15:26

Right now, grant admins do not have the ability to delete an exit, but that is in development.

01:15:33

There's a typo here.

01:15:34

It says and exit.

01:15:36

Grant admins can't delete exits.

01:15:38

We also know that some grant admins serve as case managers sometimes or have the same roles.

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They're sort of like the super users.

01:15:46

Right now, they don't have the ability to delete an exit, to update those services, but it is coming.

01:15:52

I want you guys to know because case managers currently, and I think lead supervisors have the ability to delete an exit to update the services.

01:16:00

However, grant admins do not, but it's coming, I promise.

01:16:04

I know that there's some grant admins out there that are holding their breath because they should have the ability to do it if their case managers do, and I totally agree, but we're getting there.

01:16:15

So how do you do it in the system?

01:16:17

You go to outcomes, you click on exits, you click on delete exits, and then delete request.

01:16:25

So basically from top to bottom.

01:16:29

Then everything is auto populated except for the reason for deletion.

01:16:33

You have to make sure that you populate and you put in why you're wanting to delete this exit.

01:16:38

Again, you're not deleting the case, right?

01:16:40

You're deleting the exit so you can update the services.

01:16:51

All right.

01:16:53

Now this is what the grant admin approval process looks like.

01:16:56

Grant admins, you guys would go into the tasks, you would click on either the first name or the last name and see in the status it says pending because someone has just submitted it or someone submitted it.

01:17:11

And the note or the comment session is going to be empty.

01:17:16

This says example on it, but I the reason for deletion.

01:17:19

What the case manager added is under a reason for deletion, but notes and comments is for you grant admins.

01:17:26

If you guys are going to deny, there needs to be a reason on why it's denied.

01:17:31

If you guys are going to approve, you guys need a reason for approval, OK?

01:17:34

And then you click one or the other.

01:17:42

All right, so now you're gonna

01:17:44

add a service after the exit deletion is approved.

01:17:48

As you can see, this case went from exited and follow up to active.

01:17:55

Again, make sure you add a service immediately.

01:17:59

Adding services won't always keep them active, like I said, if it's been more than 90 days, but some services are added just simply because of oversight and you'll need to add the service to keep them exited or keep them active, I'm sorry.

01:18:16

All right.

01:18:17

Oh, and I already talked about this because I think I jumped the gun earlier.

01:18:21

But if a participant enters the program, receives a P service, and then does not receive another P service until 90 days have passed, they have to be re-enrolled.

01:18:31

This means they must meet eligibility criteria for that moment, not when they first enrolled the previous time.

01:18:38

OK.

01:18:44

All right, alerts.

01:18:46

And unfortunately, I was planning on going through the alerts in the live system.

01:18:51

So let me go through some of your questions right now.

01:18:57

What if, Lorena, I see that, or Julissa, you missed the response to that question.

01:19:04

Basically,

01:19:05

If a person no longer wants to participate, that's right, Olivia, thank you.

01:19:09

You're going to have to wait for them to auto exit the system, but that participant is still going to be part of your performance indicator outcomes.

01:19:16

So for MSGs, for credentials, for Q2, Q4, they're going to be as part of the denominator.

01:19:28

Would re-enrolling for a peace service cause any issues with Social Security numbers being duplicated in the system?

01:19:33

It's not gonna be an issue for Social Security numbers being duplicated in the system, but it will probably be an issue, or it could be an issue for the unique ID.

01:19:42

It might, you know, give you the alert that says that there's another unique ID out there, but I think that we've overcome this and it will pre-populate a unique ID.

01:19:55

not based off of the Social Security number, as long as that participant has truly exited.

01:20:01

So if you try to re enroll somebody while a participant is still active, so if they're still active and you're re enrolling that participant, then that's when the flags are gonna happen, right?

01:20:10

Because there's somebody that is active in the system with the same Social Security number, with the same name, with the same birth date, et cetera, but.

01:20:20

It should not be an issue if they have exited the program.

01:20:23

If they've exited the program, it should just automatically populate a different unique ID, and if it does not, remember that you can change the unique ID.

01:20:36

Do we have to provide documentation for medical exits?

01:20:39

I believe that you do.

01:20:41

I am going to take this question though and answer it in the office hours just to get a little bit more information for you guys, but.

01:20:49

Make sure that anytime you document, you probably do want to document or you have to document for other reasons for exits.

01:20:57

Just touch base with your FPOs to make sure that the documentation that you have is sufficient.

01:21:03

I know that we have a whole TEGl on documentation and we're going to go, that's really where I'm going to go right after this is go through that TEGl and see what it says about other reasons for exit.

01:21:19

Brenda, do we need to provide a P service after that participant has already been exited?

01:21:24

So it depends, right?

01:21:25

If a participant has been exited because they truly have been exited, then you don't add a P service, right?

01:21:32

If you need to go back in time because you forgot to add P services, you can delete that exit and add the P service.

01:21:40

Now, if they exit the program

01:21:43

and they come back after 90 days, so they did not receive any services for 90 days, no P services in 90 days, then you have to re-enroll them.

01:21:53

So there's really about three different scenarios here.

01:21:56

I'm not quite sure which one you need, Brenda, but three different scenarios.

01:22:01

One, you forget to update and they have exited, you can delete that exit, go back and add those services, or if they have exited the program,

01:22:13

but they want to re-enroll, then you will need to re-enroll.

01:22:17

I'm not, Brenda, if you want to come off mute and ask the question, you're welcome.

01:22:21

Hi.

01:22:22

Oh, no, it was just after they've been exited.

01:22:25

I just wanted to make sure that we didn't have to provide a peace service after.

01:22:28

Oh, no, after they exit, no peace service, no worries.

01:22:32

Yep, no peace service after exit.

01:22:33

Once they're exited, they're exited.

01:22:35

That's right.

01:22:35

Okay, thank you.

01:22:37

Yep.

01:22:38

If they're re-enrolled, are they still considered in follow-up from their previous enrollment?

01:22:42

Yes, they are, Diana.

01:22:43

If they re-enroll, meaning that 90 days have passed, so this is day 91, and they come back to the program and they need a peace service, you have to add them in again.

01:22:52

So they're technically in follow-up, but that participant is going to be counted two times, right?

01:22:57

They're gonna be in the system two times, once for their previous time and once for the next time.

01:23:04

So that might, you know, sort of be confusing when it comes to MSGs and credentials and all of that.

01:23:10

So if that happens, please reach out to us and we'll provide further guidance on that.

01:23:14

But yes, they are considered.

01:23:16

They are still considered in follow up from their previous enrollment.

01:23:20

Great questions.

01:23:28

If I have not gotten to your question, please know that it's because I'm gonna get more information and we'll follow up for the next office hours on Monday.

01:23:43

Alright.

01:23:47

So if you have any further questions, e-mail GPMS and FJP or my e-mail directly.

01:23:55

I know that this was a very long training.

01:23:57

I want to thank you guys very much for sticking with me.

01:24:01

I hope that this provided some insight, especially to those of you that haven't quite been playing around in the sandbox yet.

01:24:07

And even if you have been in the system, I hope that this provided some new information that you might not have known before.

01:24:14

And I do want to add links for performance reporting resources for GPMS.

01:24:20

I did add

01:24:22

the production site here and the sandbox site.

01:24:24

Those are two different sites.

01:24:26

So I think there was a question earlier about a link to the sandbox site.

01:24:32

This is that link.

01:24:34

You're welcome to take a screenshot of the screen right now.

01:24:36

To have it, I can also put it.

01:24:40

Let me see if I can.

01:24:41

I'm gonna put it in the chat.

01:24:46

Isaac, I will go back to that in just a second.

01:24:49

I'm also gonna put, let me just put my

01:24:51

Pena dot Stephanie.

01:24:52

Bell at dol.gov.

01:24:57

This is my e-mail and the sandbox site is dps.gov forward slash.

01:25:15

This is the pre prod site.

01:25:24

Sometimes we have to part.

01:25:25

We have participants that have to extend the training ending.

01:25:28

Oh yeah, you just modify that date in the system.

01:25:30

so that you can modify the expected end date in the system to be in the future.

01:25:36

That's no problem at all, Becky.

01:25:37

All right, thank you.

01:25:38

Yep.

01:25:42

Oh, thank you, Kay.

01:25:43

I appreciate it.

01:25:43

Again, I know that people are all over the spectrum here on how familiar they are with GPMS, so I tried to do something in the middle.

01:25:55

Remember, we are coming out with a user guide soon, and this is not going to be the last two-hour training.

01:26:00

There's a lot in the system that I did not go over.

01:26:03

I am aware of that.

01:26:05

I think because we weren't able to go through the follow-up screens, the next office hours you guys is going to be focused on the follow-up screens.

01:26:13

And then after that, I'm probably going to do something on...

01:26:17

supportive services, 'cause we weren't able to go through that.

01:26:21

And just maybe a little bit more in depth with services in general, because I know that I just gave examples to really capture those auto exit dates and the last service dates that are up at the top.

01:26:34

But I know that some people just wanna go through and see what is really under basic career services, what is under individualized career services.

01:26:42

So I'll make sure to do that, you know, if that is of interest.

01:26:49

Israel, that's right.

01:26:50

The sandbox is not connecting right now.

01:26:52

It is down, but hopefully we'll be back up soon.

01:26:56

This is maintenance on their end.

01:26:57

I showed a screen earlier.

01:26:59

They're in maintenance mode.

01:27:00

It's not because too many people aren't in or too many in the system.

01:27:04

It is because it's in maintenance mode right now.

01:27:10

And I do wanna take this opportunity to thank all of you.

01:27:14

I know that it's been quite a year and y'all have given me a lot of grace just to get up to speed with the system.

01:27:21

And I know this training is coming in, you know, about a year later, but I'm here, I'm up to date, we're making progress, and hopefully there are many other trainings to come with you guys.

01:27:32

And I look forward to meeting more of you.

01:27:35

I've met so many of you already.

01:27:36

Again, thank you guys for your kindness and your patience.

01:27:39

And I'm really

01:27:40

really looking forward to meeting more of you.

01:27:43

Again, if you guys want to reach out, whether as an individual or as a group, please do so.

01:27:48

I'm here for you guys.

01:27:49

It's always easier as a group, but this is definitely something that I want to be able to work on with you guys.

01:27:57

And maybe after those trainings or after those individual trainings and group trainings, it'll give me more ideas about

01:28:03

another longer training, another two hour training, because I know that's what we all want, right?

01:28:08

More two hour trainings.

01:28:10

But I hope that this is a technical one where you guys can go and put to practice what we learned here today.

01:28:26

Will changing the unique ID erroneously duplicate the record given they are the same participant being counted in both groups?

01:28:33

No, and I'm not sure what you mean, are they eligible when the end enters them into the system?

01:28:40

or when they certify the case is eligible.

01:28:42

So if they certify, if they complete that page, then it's not gonna go to the approval process, if that's what you mean, Tasha.

01:28:51

But if the participant, or if the case admin, grant admin, I'm sorry, if the grant admin approves, then they will be eligible that way.

01:29:00

They can't do anything to the case.

01:29:03

whenever it is with the grant admin, but changing the unique ID will not duplicate any record.

01:29:09

If there's already a unique ID, like a similar unique ID or the same unique ID, it's going to give you an error message, Tasha, so you're not going to duplicate them.

01:29:18

But whenever you're changing someone from reportable individual to participant, that's essentially what's happening.

01:29:23

They think that you're duplicating a case, which is why you have to change that unique identifier out just a little bit.

01:29:32

And then you can go back in and change that back to what it was originally, if you would like, because it's not gonna look at it as a different participant.

01:29:42

But yeah, so no, it's not gonna duplicate anything.

01:29:46

Does GPMS have a way to remind case managers to provide career services or track them so participants don't get auto exited?

01:29:52

You are going to receive an e-mail 10 days before they are auto exited.

01:29:58

There is also under the alerts page, which I do have planned today, there is a report that you can download that is going to show you everybody that exits, I think it's like every 10 days, 30 days, and 45 days, maybe even 60 days.

01:30:11

I'm not sure we'll have to go in there and look.

01:30:14

So you can download that report or that alert

01:30:16

start at any time and it'll give you that list, but you should be receiving the case manager.

01:30:20

Whoever's assigned to that case should be receiving the e-mail that a participant is going to be auto exiting 10 days before they auto exit.

01:30:30

In work experience for expected end date, can we add a date towards the future or should we have to wait to add it?

01:30:36

No expected end date.

01:30:37

You can add a date in the future.

01:30:39

It's the start date and the most recent date that can't be in the future, but the expected end date can be the future.

01:30:46

Can we expect the system to slow down when everyone is live?

01:30:49

Well, that depends.

01:30:50

What we're seeing right now in the systems for other programs is that the system is going to slow down the week before reports are due because everyone is in it at the same time.

01:31:00

If you are ahead of the game and you're inputting information before, you know, that week before reports are due, it is not that slow.

01:31:08

I will say that today the slowness is actually not caused because everybody's in there.

01:31:13

There's actually something going on on the back end.

01:31:16

And that's, I was really worried that something like that was gonna happen because you never know what these system platforms and the IST platforms, right?

01:31:22

And so I got really worried.

01:31:24

So I took screenshots of everything and guess what happened?

01:31:28

The system was slowing down today and I wasn't able to do it.

01:31:30

So I'm glad that I had these screenshots.

01:31:32

But it is not because all of you guys are in the system today.

01:31:36

But yes, the system can slow down if everybody is in the system at the same time, like the week before, that usually happens the week before

01:31:45

or three days before and people do start panicking.

01:31:49

But that is why we tell you guys to please put in all of the data, the updated data as soon as you have it so that you guys aren't crunching for time towards the end of the reporting period.

01:32:00

And what I'm sorry, not the reporting period, but the due date that the reports are due, which is 45 days after the reporting period.

01:32:07

Can you please put an example of what you would put in the box for one?

01:32:13

I'm sorry, 167 box.

01:32:14

Thank you so much, Dana, for talking about this or asking this question because I actually had it written down earlier and I just forgot to say it.

01:32:26

Let me go back to that slide.

01:32:30

This slide right here under training, you guys need to put in the actual total hours.

01:32:36

So it's not the amount, it's the actual total hours for that training.