

TEAMS Reference Guide

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Note from the Texas Workforce Commission Adult Education and Literacy Department:

The following guide has been modified slightly to reflect changes pursuant to the transition of the Adult Education and Literacy program from the Texas Education Agency to the Texas Workforce Commission. The document contains important notes that reflect changes in TEAMS forthcoming as the application transitions from TEA to TWC. Notes are listed in call out boxes (example below) throughout the document.

Forthcoming Changes

to TEAMS:

Sample

Overview

Welcome to Texas Educating Adults Management System (TEAMS)

Purpose

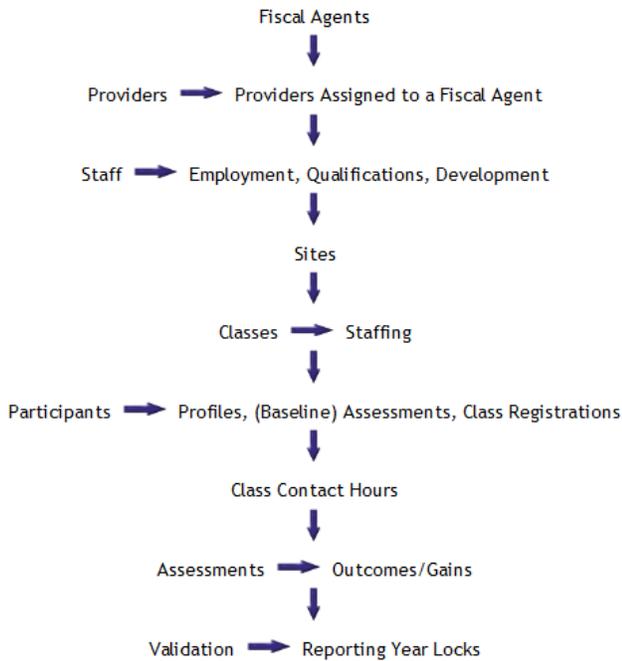
Texas Educating Adults Management System (TEAMS), an online tool accessible through the internet, is used to maintain information about adult education programs throughout the state. Some participant information is shared by multiple Fiscal Agents while other data is Fiscal Agent-specific.

Authorized users can view and/or update the following:

- [Administrator](#) Persons from Texas LEARNS who are responsible for administering TEAMS and Fiscal Agent Memos
- Participant Demographics and [Profile](#) General and current employment information that applies to participants who enter into adult education programs and that is linked to a specific year
- Participant Assessments and Outcomes/Gains
- Fiscal Agents, Sites, Providers, [Support Services](#) Support and instructional services offered by an institution, agency, or organization for participants of adult education programs and Grants
- Classes and [Class](#) Particular instance of a course of instruction at a given site Registrations
- Class [Contact Hours](#) Number of hours of instructional activity that a participant receives or in which a participant attends; these total hours for a time period are broken down into quarter-hour increments
- Staffing and [Staff](#) Development
- Administrative data and settings such as Data Signoff and Reporting Year Locks

Data Entry Sequence

Data must be entered in a logical sequence and deleted in the reverse of this sequence:



Forthcoming Changes to TEAMS:

TWC defines Fiscal Agent differently than was previously the case when the federal program was overseen by TEA. Under TEA, the entity who received the grant and was responsible for all service delivery and reporting over providers was referred to as the Fiscal Agent. Under TWC, this entity is the Grant Recipient. In this diagram, Fiscal Agent should be considered the AEL Grant Recipient as defined in 40 Texas Administrative Code §805.2.

What's New in TEAMS?

See the Admin Memo on the TEAMS home page Main TEAMS page with a menu for selecting other pages for additional changes and enhancements.

New Instrument Group

The new instrument group, GAIN, has been added to the assessments.

Participant Search Improvements

You can now search for a participant using only the last four digits of the social security number. In addition, you can search for a document by simply typing its number. The *document type* is no longer required.

Participant Profile Improvements

The Participant Profile page has been reorganized for easier use. Additional optional profile variables have been added that are not in the Student Enrollment form. Participant achievements have been divided into primary and secondary achievements. A Notes text box is available to collect information about the orientation sites or classes.

Classes

You can now export and import monthly contact hours to and from Excel.

Reports Enhancements

The reports have been rearranged into different categories so that they are easier to find. A new category of Distance Learner reports is available. GED reports are also categorized under their own heading. A new report for Average Daily Attendance is available.

Request User ID and Logon Procedure

Access to TEAMS is protected by the Texas Education Agency Secure Environment (TEASE) and requires an authorized user name and password. Requests for access will be forwarded to the Adult Education Program *Administrator* for approval.

To Apply for Access

The form used to request access to TEAMS is accessible from the [TEASE Applications Reference Page](#) or from the Adult Education program area web page (see [Contact Information](#)). When you complete the form, please verify that your email address is current and is spelled correctly; this email address is used for all correspondence regarding your access. Print the form and obtain required signatures. Then follow instructions at the bottom of the form to submit it to TWC Adult Education and Literacy.

If your request for access is approved, you will be notified by email from TEA Security. You will be assigned a specific role or *level* of access. The tasks you can or cannot perform in the application correspond to this role.

Forthcoming Changes to TEAMS: Login processes and procedures will change in the coming months as the TEAMS application transitions from TEA to TWC. Users will be notified of changes in security processes and access roles.

To Log On

To log on to the main page of TEAMS:

1. Type `http://sequin.tea.state.tx.us/apps/logon.asp` in the browser's address bar.

2. At the logon page, type your user name and password. If you work with other TEA applications, the links to those applications also appear on the list.
3. In the Application List, click TEAMS - Texas Educating Adults Management System.

TEASE Access Time Out

Access through TEASE expires when a program has not accessed the server (changed pages, or saved data) for 20 minutes. If you discontinue work in TEAMS temporarily but leave the program open, your access may expire. To re-establish access, log on again.

If you enter information in a page and then leave it for several minutes to attend to another task, you will lose unsaved changes if TEASE access expires.

User Roles and Tasks

The table below shows the user roles and the data entry tasks that each role can perform.

Forthcoming Changes to TEAMS:

Roles reflected here may change as TEAMS fully transitions to TWC.

User Roles and Data Entry Tasks Allowed

User Role	Tasks Allowed
Administrator	All tasks listed under the lower roles below except request or approve Exemption from In-Service Hours Requirements, plus: <ul style="list-style-type: none"> - Lock and unlock Reporting Year before hard lock date, and manage Reporting Year dates - Create new <u>school year</u> - Exemption from In-Service Hours Requirements (disapprove if already approved)

User Role	Tasks Allowed
Grant Service Manager	<p>All tasks listed under the lower roles below except Validate Sites as <u>Supervisor</u> (Edit), plus:</p> <ul style="list-style-type: none"> - Exemption from In-Service Hours Requirements (approve, disapprove)
Director	<p>All tasks listed under the lower roles below except Validate Sites as Supervisor (Edit) and Validate Contact Hours by Month as Supervisor, plus:</p> <ul style="list-style-type: none"> - Fiscal Agents and Fiscal Agent Memos (edit) - Statewide List of Providers (add/edit) - Assign Provider to FA (add/edit/delete) - Validate Sites and Contact Hours by Month as Director (view/edit) - Assign <u>Staff</u> Development Activity hours to Staff members (add/edit/delete) (see note below table) - Exemption from In-Service Hours Requirements (request) - Data Signoff Report (view/approve) - Reporting Year Soft Locks (lock/unlock) - Roll over Classes and associated Staff
Supervisor	<p>All tasks listed under the roles below, plus:</p> <ul style="list-style-type: none"> - Sites (add/edit/delete) - Validate by Month as Supervisor (edit) - Staff Employment with Fiscal Agent and Provider (add/edit/delete) - Staff Development Activities (add/edit/delete) (see note below table) - Classes and Staffing (add/edit/delete) - Participant Contact Hour Funding Sources (edit)
TCALL User	<ul style="list-style-type: none"> - Staff Development Activities (add/edit/delete) (see note below table)

User Role	Tasks Allowed
GREAT Center Coordinator	<ul style="list-style-type: none"> - Staff Development Activities (add/edit/delete) (see note below table)
Staff	<p>All tasks listed under Reader, plus:</p> <ul style="list-style-type: none"> - Participants (add/edit/delete) - Participant <u>Profile</u> Achievements (select/de-select) - Participant Assessments (add/edit) - <u>Class</u> Registrations and Participant Contact Hours (except Funding Sources) (add/edit/delete) - Staff Employment Details (add/edit/delete, and view full SSN) - Participant <u>Separation Reason</u> (select/de-select)
Reader	<p>View-only access to the following:</p> <ul style="list-style-type: none"> - Memos - Fiscal Agents - Statewide List of Providers - Staff Employment Details (except full SSN) - Staff Development Activities - Classes and Class Staffing - Participant Demographics, Profiles, Class Registrations, and Contact Hours - Participant Assessments and Baseline, Separation Reason, Levels Completed and Gains - Reporting Year Locks - Reports - Code Tables

Users with the permission to edit or delete Staff Development Activities can perform those tasks only on Activities that were created in association with the user's Fiscal Agent. However, any user with the permission to assign Staff Development Activity Hours to Staff members can do so with any Activity, regardless of whether it is associated with their Fiscal Agent.

Data changes not listed above must be performed by TWC technical teams with the approval of TWC Adult Education and Literacy.

System Navigation

When you log on with your user name and password, the system provides access to accomplish tasks that correspond to your role and the appropriate data. Administrator -level users have access to all tasks and data. Other users might not see all the options and buttons pictured in page images.

TEAMS Home Page and Main Menu

When you first log onto TEASE and choose TEAMS from the Application List, the TEAMS Home page displays any applicable memos in the main page and a navigation menu on the left. Click the desired menu option, button, or "breadcrumb" link to access the associated page. Links in the main section of the page (not in the navigation menu) appear as blue text

Fiscal Agents

Directors and Administrators

Fiscal Agent Search and Entry

Search for a Fiscal Agent

To begin working with fiscal agents, click **Fiscal Agents** in the main menu. If you have access to more than one fiscal agent, the Fiscal Agents selector page appears:

Fiscal Agents



The screenshot shows a web interface for selecting a fiscal agent. It features a title "Fiscal Agents" in blue. Below the title is a form with two rows of controls. The first row has a label "School Year:" followed by a dropdown menu showing "2011-2012". The second row has a label "Fiscal Agent" followed by a dropdown menu showing "1" and a text input field containing "ABILENE ISD". Below the form are two buttons: "Get" and "Add Fiscal Agent".

The options lists default to the fiscal agent with the lowest fiscal agent code.

1. Select the appropriate school year .
2. Find the existing fiscal agent by selecting either its code or name of the desired fiscal agent.
3. Click **Get**.

If you have access to only one Fiscal Agent, the details page for that Fiscal Agent immediately appears. See [View or Edit Information for an Existing Fiscal Agent](#) below.

Add a New Fiscal Agent

1. Administrators Only
2. Click **Add Fiscal Agent**. A blank Fiscal Agent Details page appears:

Fiscal Agent Details Save Cancel

Name

Fiscal Agent ID

Fiscal Agent Name*

Title ▾

Director Last Name*

Director First Name*

Director Middle Name

Director Contact Information ⊞

Address*

City* State* ▾ Zip Code* -

Main Phone* -- ext.

Alternate Phone -- ext.

Fax Number -- ext.

Email Address*

Confirm Email Address*

School Year: 2011-2012

Program Serving Even Start Participants: ▾

Funding Sources*

Regular Adult Ed (TEA St & Fed)

Even Start

3. Type the name of the fiscal agent (required).
4. Select a title for the director of the fiscal agent.
5. Type the last and first name of the director (required).
6. Type a middle name, if desired.
7. Type the mailing address for the fiscal agent (required).
8. Type telephone numbers for the fiscal agent. A main phone number is required.
9. Type the contact e-mail address.
10. Type a confirmation e-mail address that matches the e-mail address.
11. Notice the school year is the one that you selected when you searched for the fiscal agent. If the school year is incorrect, cancel and select another one.
12. Select **Yes** or **No** to indicate whether the fiscal agent has a program serving Even Start participants.
13. Check the appropriate **Funding Sources**. The funding sources selected determine the following:

14. The check boxes that appear in the **Class Registration** pages for this fiscal agent for the specified school year
15. The options that appear in the Funding Source list in the **Contact Hours Period** page for participants registered for a class that is sponsored by this fiscal agent for the specified school year
16. Click **Save** and confirm.

View or Edit Information for an Existing Fiscal Agent

1. (TWC Staff and Directors Only) Click **Fiscal Agents** in the main menu.
2. If you are a TWC staff member, select the Fiscal Agent as described at the beginning of this help topic and click **Get**. Otherwise, the **Details** page appears for the selected Fiscal Agent:

Fiscal Agent Details

Name	
Fiscal Agent ID	1
Fiscal Agent Name*	<input type="text" value="ABILENE ISD"/>
Title	<input type="text" value="Mr"/>
Director Last Name*	<input type="text" value="Rideout"/>
Director First Name*	<input type="text" value="Merri"/>
Director Middle Name	<input type="text" value="Lynn"/>
Director Contact Information ⊕	

School Year:

Program Serving Even Start Participants:

Funding Sources*	
<input checked="" type="checkbox"/>	Regular Adult Ed (TEA St & Fed)
<input checked="" type="checkbox"/>	Even Start
<input checked="" type="checkbox"/>	TANF (TEA State & Federal)
<input checked="" type="checkbox"/>	English Literacy Civics Education
<input checked="" type="checkbox"/>	Corrections & Institutionalized TEA
<input checked="" type="checkbox"/>	Local
<input type="checkbox"/>	Other
<input checked="" type="checkbox"/>	Windham ISD Funding

1. To edit the funding sources, if a school year selector is present, start by selecting the **School Year**. If it is not present, then only the one school year is open for editing.
2. Click **Edit**. The Director Contact Information section expands.
3. Edit the data as needed.

If you change the **Email Address**, you must also change the **Confirm Email Address** to the same new email address. If you copy and paste the email address without double-checking it, you

defeat the purpose of having a Confirm Email Address field.

Click the check boxes to select or de-select the Funding Sources.

Only TWC staff (TEAMS Administrators) can change **Funding Sources** other than the **Local** and **Other** options. Since funding source information is taken from the AEGIS/TEA eGrants system, normally you should not need to change it here.

You can edit information only for a school year that is open for editing. At most, two school years are open for editing at any one time: the previous school year and the upcoming school year.

The Funding Source selections made here determine which check boxes appear in the **Class Registration** page and in the **Funding Source** list for **Contact Hours Periods** for participants registered for classes sponsored by this fiscal agent for the specified school year.

4. Click **Save** and confirm your choice.

Delete a Fiscal Agent

Administrators Only

You cannot delete a fiscal agent that has any associated records, even for past years. Delete the associated records first, then delete the fiscal agent.

1. Select search options for the desired fiscal agent.
2. Click **Get**.
3. Click **Delete**, then confirm your choice.

Caution: After you confirm the deletion, the record cannot be recovered.

Fiscal Agent Memo

Directors and Supervisors Only

To view or edit a [Fiscal Agent Memo](#) :

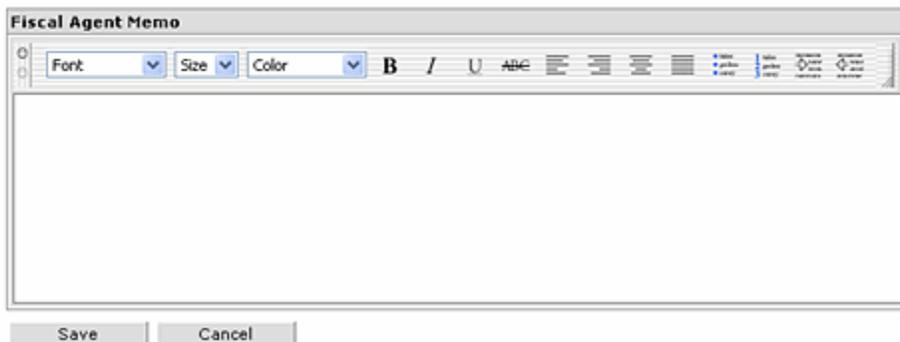
1. Click TEAMS Home to display the TEAMS [Home page](#) . The most recent Admin Memo appears:



2. Click << **Previous** or **Next** >> in the lower-right corner to navigate among the existing memos.
3. To view Fiscal Agent memos, click the link in the upper-right corner.
4. In the Fiscal Agent Memo page, if you have access to multiple Fiscal Agents, you can display memos from a different Fiscal Agent by selecting the *Fiscal Agent code* or name from the appropriate list.
5. To edit the displayed memo, click Edit below the Fiscal Agent Memo field. An editing tool bar appears and the memo field you are not editing disappears:

Welcome to TEAMS

Fiscal Agent 1 - FISCAL AGENT ONE



Mouse over any control to see a pop-up description of its function.

6. Enter your memo, then click Save and confirm your choice.

If you paste a web address into a memo, it becomes a clickable hyperlink, taking the user to the specified web page. However, if the user simply left-clicks the link, the new web page appears in the same browser window as the TEAMS application. To avoid this, right-click the link and choose *Open in New Window* (in Internet Explorer; the wording might vary in other browsers).

Providers

Statewide List of Providers

Directors and Administrators

Use the Statewide List of Providers page to add or edit information about providers in Texas generally. You can do this as soon as you have been granted access to the application, regardless of whether your Fiscal Agent has been set up. When your Fiscal Agent has been setup, Providers on the statewide list can be assigned to your Fiscal Agent to indicate that they are providing services to your agency specifically.

Click Statewide List of Providers in the left menu to open the Statewide List of Providers Search page:

[Home](#) > Statewide List of Providers

Statewide List of Providers

Provider Search

Provider Name Provider Type Status

Provider Name	Provider Type	Status	Edit	Action
21st Century	Local Education Agencies	Active	Edit	Delete
22nd & 207th Judicial District-Hays,Cald	Other Inst of Higher Educ	Active	Edit	Delete
2nd 25th Judicial District CSCD-Gonzales	Other Inst of Higher Educ	Active	Edit	Delete
2nd Baptist Church	Faith-based Organizations	Active	Edit	Delete
33rd Judicial District CSCD-B,B,&Llano	Other Inst of Higher Educ	Active	Edit	Delete
38th Judicial RTC	Correctional Institutions	Active	Edit	Delete
A. C. Craig Resource Center	Faith-based Organizations	Active	Edit	Delete
A.A.M.A.	Community-based organizations	Active	Edit	Delete
AAA	Faith-based Organizations	Active	Edit	Delete
AAA Educational Svcs	Local Education Agencies	Active	Edit	Delete
AAEPDC	Local Education Agencies	Active	Edit	Delete
AARP Senior Employment Program	Other Inst of Higher Educ	Active	Edit	Delete
Abbott ISD	Local Education Agencies	Active	Edit	Delete
ABC Foundation	Community-based organizations	Active	Edit	Delete
Abernathy ISD	Local Education Agencies	Active	Edit	Delete

* Choose

1 2 3 4 5 6 7 8 9 10 ...

By default, all providers in the database are displayed, 15 at a time, in alphabetical order. To display providers not currently shown, do one of the following:

- Click the page number at the bottom-left corner of the page to jump to a different set of 15 providers.
- Filter the list by entering the first part of the Provider Name and/or selecting an option from one of the drop-down lists at the top of the page and clicking Search.

Add a Provider

To add a provider, enter the Provider Name and select the Provider Type in the last row in the table, then click Add.

When you add a Provider, it is placed into its proper place in the complete list. This makes the new Provider disappear when you click *Add* if it does not match the current search parameters AND belong alphabetically in the current page of up to 15 Providers. To view the newly added Provider, run a search that matches the Provider that you just added.

Edit a Provider

To edit a provider, click Edit next to the desired Provider, make the desired changes, then click Update.

Delete a Provider

To delete a provider, click Delete next to the desired Provider and confirm your choice.

Caution: After you confirm the deletion, the record cannot be recovered.

Assign Provider to Fiscal Agent

Directors and Administrators

Use the Assign Provider to FA page to specify the providers that provide services to your fiscal agent, to maintain details about the working relationship with the provider, and to specify support services and grant money provided. (To add or edit information about service providers in Texas generally -- independently of any association with any Fiscal Agent -- use the Providers page instead.)

Click Assign Provider to FA in the left menu to open the Assign Provider to FA page:

Home > Assign Provider to FA

Assign Provider to FA

Reporting Year: 2006-2007 Regular Adult Ed. Reporting

Fiscal Agent: 1 FISCAL AGENT ONE

Provider Information

Provider Name:

Provider Type: Provider Category:

Providers between 7/1/2006 and 6/30/2007

Provider Name	Provider Type	Provider Category	Begin Date	End Date
Abalone ISD	Local Education Agencies	Fiscal Agency	7/1/2005	
ABC ISD	Community-based organizations	Collaborating Organization	7/1/2005	
Bakerville ISD	Local Education Agencies	Collaborating Organization	7/1/2005	
Brackenridge ISD	All Other Agencies	Collaborating Organization	7/1/2005	
Clive ISD	Local Education Agencies	Sub-Contractor	7/1/2005	

The search options default to the Fiscal Agent with the lowest Fiscal Agent code (if you have access to multiple fiscal agents), the latest *School Year* Four-digit fiscal year for which the request for application is made and for which the data is collected, defaulted to the current year and the dates that correspond to that school year. You can change any of these options, or enter the first part of the desired Provider Name, then click Search to search for other providers.

Enter Fiscal Agent-Provider Details

1. Click Assign New Provider. A blank Provider Details page opens:

Home > Assign Provider to FA > Provider Details

Provider Details

1 - FISCAL AGENT ONE

Provider Details

Provider Name* Provider Category* Begin Date* End Date

Contact Information

Contact's Function Title

Last Name* First Name* Middle Name

Street Address

City* State* Zip Code

Main Phone* ext. Alternate Phone ext.

Fax Number ext. Email

Confirm Email

2. Select or enter required/desired information. To designate your own fiscal agent as a provider, select "Fiscal Agency" as the Provider Category. Only one provider per fiscal agent can have "Fiscal Agency" as its Provider Category.
3. Click Save and confirm your choice.

When you assign a Provider to a Fiscal Agent, the new record is placed into its proper position in the complete list. This makes it disappear if it does not match the current search parameters at the top of the page AND belong alphabetically in the current page of up to 15 Assigned Providers. To view the newly added Provider-Fiscal Agent relationship, run a search that matches the Provider-Fiscal Agent relationship that you just created.

Edit Assigned Provider Details

1. Begin by searching for the desired Fiscal Agent as described above, then click the Provider Name link for the desired Provider. The Provider Details page appears.
2. Make the desired changes. To edit Contact Information, click the expand button (☰) at the right side of the form.

Click Save and confirm your choice.

When you assign a Provider to a Fiscal Agent, the new record is placed into its proper position in the complete list. This makes it disappear if it does not match the current search parameters at the top of the page AND belong alphabetically in the current page of up to 15 Assigned Providers. To view the newly added Provider-Fiscal Agent relationship, run a search that matches the Provider-Fiscal Agent relationship that you just created.

Delete a Fiscal Agent's Provider

The delete function in the Fiscal Agent's Provider page deletes only the working relationship between the fiscal agent and the provider. To delete a provider itself, use the [Providers](#) page.

1. Retrieve the fiscal agent-provider assignment record by searching as described above.
2. Click the Provider Name link for the desired record.

Click Delete, then confirm your choice.

You cannot delete a fiscal agent's provider that has any Support Services or Grant records. Delete all the Support Services and Grant records first, then delete the fiscal agent's provider.

Add/Edit/Delete Support Services

1. Retrieve the fiscal agent's provider by searching as described above.
2. Click the Provider Name link for the desired provider.
3. Click Add Service. A new, blank Support Services data row appears:

Support Services

Begin Date	End Date	Service(s) Offered	Action
* 7/7/2006		* Choose	Save Cancel

Add Service

4. *To add:* Enter the Begin Date and (if applicable) the End Date. Select the Service(s) Offered, then click Save.
5. *To edit:* Click Edit next to the desired Support Service, make the desired changes, then click Update.
6. *To delete:* Click Delete next to the desired Support Service and confirm your choice.

Add Grant

Provider-Fiscal Agent relationships in the "Fiscal Agency" or "Sub-Contractor" Provider Category must have at least one Grant record for the current funding year.

1. Retrieve the fiscal agent's provider by searching as described above.
2. Click the Provider Name link for the desired provider.
3. Click Add Grant. A new, blank grant data row appears:

Grant Amount

School Year	Federal Funding	State Funding	Action
* Choose	*	*	Save Cancel

Add Grant

4. Select a School Year.
5. Enter the applicable Funding Amounts. Both the Federal and State fields require data entry (omit commas). If the amount is 0, enter 0.
6. Click Save.

Enter the amount of your Federal WIA grant followed by the amount of your state grant. If you have an EL Civics Program only you will not have state funds, only federal funds. If you have Regular funds and ELC funds add the two amounts to find your federal award. Do not enter TANF funds or Even Start Funds.

Edit/Delete Grant

1. Retrieve the fiscal agent's Provider by searching as described above.
2. Click the Provider Name link for the desired provider.
3. *To edit:* Click Edit in the desired Grant data row, make the desired changes, then click Update.

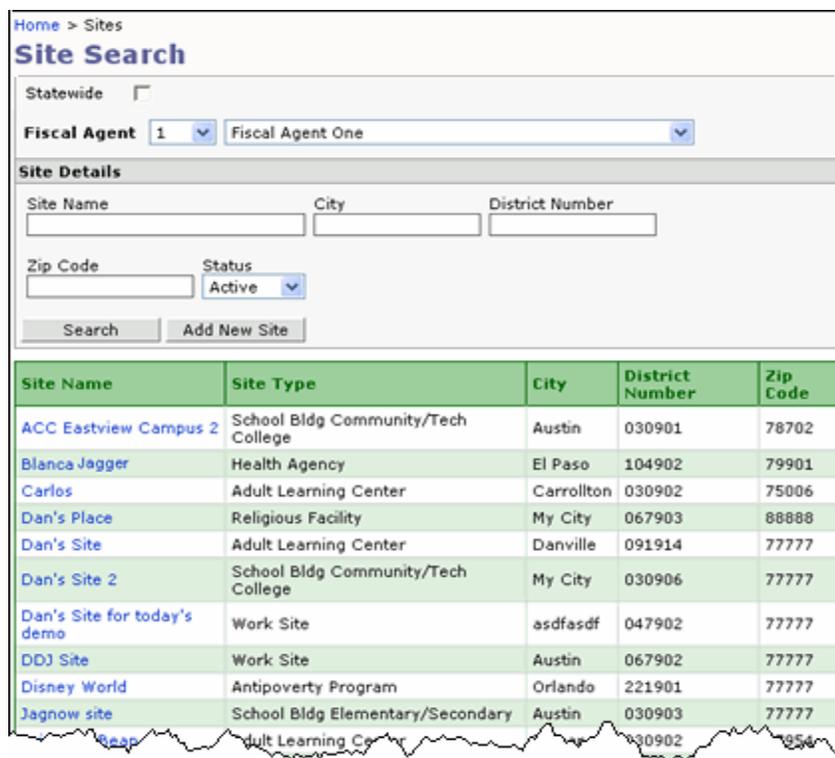
To delete: Click Delete in the desired Grant data row and confirm your choice.

Sites

Supervisors and Above

A Site is associated with a Provider and Fiscal Agent, so those organizations and their working relationship must be entered before a Site can be entered under them. A Site may be used by more than one Provider Fiscal Agent and its Provider.

To work with Site data, click Sites in the left menu. The Site Search page appears:



The screenshot shows the 'Site Search' interface. At the top, there is a breadcrumb 'Home > Sites' and the title 'Site Search'. Below the title, there is a 'Statewide' checkbox which is currently unchecked. A 'Fiscal Agent' dropdown menu is set to '1' and displays 'Fiscal Agent One'. Under the 'Site Details' section, there are input fields for 'Site Name', 'City', and 'District Number'. Below these are fields for 'Zip Code' and a 'Status' dropdown menu set to 'Active'. There are 'Search' and 'Add New Site' buttons. Below the form is a table with the following data:

Site Name	Site Type	City	District Number	Zip Code
ACC Eastview Campus 2	School Bldg Community/Tech College	Austin	030901	78702
Blanca Jagger	Health Agency	El Paso	104902	79901
Carlos	Adult Learning Center	Carrollton	030902	75006
Dan's Place	Religious Facility	My City	067903	88888
Dan's Site	Adult Learning Center	Danville	091914	77777
Dan's Site 2	School Bldg Community/Tech College	My City	030906	77777
Dan's Site for today's demo	Work Site	asdfasdf	047902	77777
DDJ Site	Work Site	Austin	067902	77777
Disney World	Antipoverty Program	Orlando	221901	77777
Jagnow site	School Bldg Elementary/Secondary	Austin	030903	77777
Jag	Adult Learning C		030902	754

All the sites for the currently selected Fiscal Agent are listed (or for your Fiscal Agent, if you are not an administrator)To restrict the list of sites, select or enter partial information in any field, then click Search. To expand the list beyond those that have a relationship with your fiscal agent(s), click the Statewide check box.

Add a Site

To add a site:

1. Click Add New Site. A blank Site Details page appears:

Home > Sites > New Site

Site Details

Save Cancel

Fiscal Agent: 1 Fiscal Agent One

Site Information

Provider* Choose

District Geographic Area* Choose

Site Type* Choose

Site Name*

Site Description

Address*

City* State* Zip Code*

Texas

Contact Information

Contact Name*

Main Phone* () - ext. ()

Alternate Phone () - ext. ()

Fax Number () - ext. ()

Email

Confirm Email

2. Select or enter required/desired information.
3. Click Save and confirm your choice.

Edit a Site

To edit information about a Site:

1. Search for the Site as described above.
2. Click the Site Name. The Site Details page appears.
3. Click Edit and make the desired changes.
4. Click Save and confirm your choice.

Delete a Site

You cannot delete a Site that has any associated records (Fiscal Agents other than the selected one, or Classes).

Delete the associated records first, then delete the Site.

As is true of all records in TEAMS, you cannot delete Site information from a locked Reporting Year. To make a Site unavailable for assignment for a Class Particular instance of a course of instruction at a given site, set its Status to Inactive using the edit procedure described above

1. Search for the Site as described above.
2. Click the Site Name. The Site Details page appears as above.
3. Click Delete, then confirm your choice.

Caution: After you confirm the deletion, the record cannot be recovered.

View Classes Associated with a Site

To view classes associated with a Site:

1. Search for the Site as described above.
2. Click the Site Name. The Site Details page appears.
3. Scroll to the bottom of the page until the Reporting Year selector is visible:

Select Reporting Year

4. Select the desired year and reporting type. A list of the Classes associated with the Site for the selected Reporting Year appears:

Classes

Class Name	Class Number	Begin Date	End Date	Participant Count	Total Contact Hours
American Life	7788	07/07/2005	06/30/2006	4	75.75
Ravi Class	Ravi Class	07/01/2005	06/30/2006	2	0

5. Click the Class Name link to jump to the Class Details page for the selected Class.

Staff

Staff

Directors, Supervisors and Administrators

To work with staff data, click Staff in the left menu. The Staff Search page appears:

Home > Staff

Staff Search

Staff Information
Last Name First Name Middle Name
SSN City Status
 Check box to search Staff by Fiscal Agent
Fiscal Agent 1 - FISCAL AGENT ONE

*Click on column header to sort by ascending or descending.

To search by Fiscal Agent, check the box and wait a moment for the list to appear. Enter partial information in any field (except SSNs, which must be entered in their entirety), or select an option from the Status and/or Fiscal Agent list. Then click Search. Staff members that match your search are listed in a table:

SSN	Last Name	First Name	Middle Name	City	Status
XXX-XX-1111	Angeles	Suzanne		El Paso	Active
XXX-XX-2222	Applewhite	Dorothy	Kay	Waco	Active
XXX-XX-3333	Arsenio	Rodney	P	Houston	Active
XXX-XX-4444	Azle	Stephanie		Amarillo	Active
YYY-VV-5555	Baker	Leann	M	Houston	Active

Add Staff

Before adding a Staff member, you are strongly encouraged to search for the Staff member to avoid wasting time and creating duplicate information. For a system-wide search, do not check the "Check box to search Staff by Fiscal Agent" check box.

Entry of a new Staff member record requires that various other records be entered already. See the Data Entry Sequence and Record Type Dependencies.

Forthcoming Changes to TEAMS:

Under TWC rules, staff must have six *in-service* hours. All pre-service activities will be in-service activities (40 Texas Administrative Code § 800.68).

The procedure and pages used for adding a new Staff member are significantly different from those used for editing. Immediately after saving a new Staff member's demographic data, you have the opportunity to enter Employment Details as they relate to your Fiscal Agent, Qualifications, and Pre-Service Staff Development Hours. You must complete all three sections in order as you move down the page.

This is the only opportunity that you will have to enter Pre-Service Staff Development Hours. After you leave this page, you can only enter In-Service Hours. Staff must have at least six pre-service hours to be employed by a fiscal agent in a teaching role. Detailed regulations concerning adult education employment requirements may be found online at <http://www.tea.state.tx.us/rules/tac/chapter089/ch089b.html#89.25>

To add a staff member:

1. Click Add Staff. The Staff Details page appears:

Home > Staff > New Staff

Staff Details

Demographic Data

Title: Choose ▾ Last Name* [] First Name* [] Middle Name []

SSN* [] Gender* Choose ▾ Begin Employment Date in Texas Adult Ed* []

Contact Information

[]

[]

City [] State Texas ▾ Zip Code [] []

Main Phone () [] [] ext. []

Alternate Phone () [] [] ext. []

Fax Number () [] [] ext. []

Email []

Confirm Email []

Save Cancel

2. Select or enter required/desired Demographic data and Contact information, noting the following:
 - Dashes are not required in the SSN.
 - In Begin Employment Date in Texas Adult Ed, the date must be entered in **mm/dd/yyyy** format.

- Click Save and confirm your choice. A Fiscal Agent selector (if you have access to more than one) and a button for adding Employment Details appear:

Fiscal Agent: 1 [v] FISCAL AGENT ONE [v]

Employment Details

No Employment Details found for the selected Fiscal Agent.

Add Employment

- Click Add Employment. The Employment Details page appears, with Qualifications and Staff Development Hours sections at the bottom:

Home > Staff > Harvey Mudd > Employment Details

Employment Details

Staff Name : Harvey Mudd School Year: 2006-2007 [v]
 Fiscal Agent : 1 [v] FISCAL AGENT ONE [v]

Save Cancel

Primary Job

Begin Date* End Date Job* Employment Status*

[] [] Choose [v] Choose [v]

Secondary Job

Administrator

Counselor

Director

Instructional Aide

Instructional Coordinator

Secretary or Clerical Staff

Teacher

Tester

Trainer

Other (non-instructional)

Qualifications

Texas Certification Level* Choose [v]

Highest Degree Obtained* Choose [v]

Highest Degree Description []

Years of Experience in Adult Ed in Texas* [] (whole years only)

Staff Development Hours (Pre-Service)

Activity ID	Activity Name	Maximum Pre-Service Hours	Staff Development Type	Hours Attended	Action
Select Activity					
Save Cancel					

5. Double-check the School Year and Fiscal Agent before entering data.
6. You must enter a Start Date. Entering an End Date is optional.
7. Select the staff member's Primary Job and Employment Status from the lists.
8. Check the check box for all the Secondary Jobs that apply to the Staff member. No Secondary Job can be the same as the Primary Job.
9. Select or enter the Staff member's Qualifications.
10. In the Staff Development Hours section, click Select Activity. A list of Staff Development Activities appears in a pop-up window:

Staff Development Activities Search

School Year and Reporting Year
 2006-2007 Regular Adult Ed. Reporting

Activity Name and Date
 Activity Name: Begin Date*: 7/1/2006 End Date*: 6/30/2007

Search Add New Activity

Activity Name	Maximum Pre/In-Service Hours	Begin Date	End Date	Staff Enrolled (All FA's)
aafa	8.00	7/1/2006	7/5/2006	8
activity one	8.00	7/1/2006	6/30/2007	26
asd	8.00	10/1/2006	10/1/2006	0
asdfas	40.00	7/1/2006	6/30/2007	1
asdfasf	8.00	7/1/2006	7/5/2006	1
asdfasdfdasf	8.00	7/1/2006	7/2/2006	1
dfasf	8.00	7/1/2006	7/30/2006	1

11. If the desired Activity is not immediately visible, do one of the following:
 - Click one of the page number links below the data grid to display Activity names that come later in the alphabet.
 - Enter any one or combination of the first part of the name, the Begin Date, or End Date, then click **Search**.
12. Click the desired Activity Name . The pop-up window closes and the Activity details appear at the bottom of the main page:

Activity ID	Activity Name	Maximum Pre-Service Hours	Staff Development Type	Hours Attended	Action
23610	activity one	8.00	Pre-Service	5 <input type="text"/>	Delete

Select Activity

13. Enter the Hours Attended .

14. Repeat the previous two steps until all Pre-Service activities and hours have been entered.
15. Click Save and confirm your choice.

Edit Staff

To edit information about a staff member:

1. Search for the staff member as described above.
2. Click the SSN link. The Staff Details page appears as described above.
3. Click Edit and make the desired changes.
4. Click Save and confirm your choice.

Staff details can be edited only after adding staff employment details and, if needed, selecting a fiscal agent where the staff member is or has been employed.

To make a Staff member inactive, enter an End Date into the Staff member's Employment Details. If you enter an End Date that is in the future, the staff member will remain active until the End Date passes.

Delete Staff

You cannot delete the record for a staff member who is employed by another fiscal agent, or that has any associated records, even for past years. Delete the associated records first, then delete the staff member.

1. Search for the staff member as described above.
2. Click the SSN link. The Staff Details page appears as described above.

Click Delete, then confirm your choice.

Employment Details

To begin working with employment details, click [Staff](#) in the left menu and search for the staff member as described in [Staff Search and Entry](#). Any existing Employment Details for your default Fiscal Agent are listed at the bottom of the page. Fiscal agents for which the selected staff member has employment are listed in the middle of the page. To view Employment Details for a Fiscal Agent other than your default, select it by code or name from the appropriate list.

Add Employment Details

1. If an Employment Detail record does not exist for the selected Fiscal Agent, click Add Employment. The Employment Details page appears:

Home > Staff > Johnny Appleseed > Employment Details

Employment Details

Staff Name : Johnny Appleseed
Fiscal Agent : 1 - FISCAL AGENT ONE

Primary Job			
Begin Date*	End Date	Job*	Employment Status*
<input type="text"/>	<input type="text"/>	Choose <input type="button" value="v"/>	Choose <input type="button" value="v"/>

Secondary Job
<input type="checkbox"/> Administrator
<input type="checkbox"/> Counselor
<input type="checkbox"/> Director
<input type="checkbox"/> Instructional Aide
<input type="checkbox"/> Instructional Coordinator
<input type="checkbox"/> Secretary or Clerical Staff
<input type="checkbox"/> Teacher
<input type="checkbox"/> Tester
<input type="checkbox"/> Trainer
<input type="checkbox"/> Other (non-instructional)

2. Select or enter required/desired information, noting the following:
3. Information in the Primary Job section is required, except for End Date.
4. Click the check boxes to select or de-select one or more Secondary Jobs. No Secondary Job can be the same as the Primary Job.
5. All staff members must have at least six pre-service Staff Development hours before the Employment Start Date, unless the staff member has no job other than **Secretary or Clerical Staff, Tester, or Other (non-instructional)**.
6. Click Save and confirm your choice.

Edit Employment Details

1. Click the Begin Date link, then click Edit.
2. Make the desired changes, then click Save and confirm your choice.

To make a staff member inactive, enter an End Date when the staff member became or will become inactive. If you enter a future date, the inactive status will not take effect until that date passes.

Qualifications

To begin working with a [Staff](#) member's qualifications for employment, open the Staff Details page as described in [Staff Search and Entry](#). Existing qualifications are listed in a table in the middle of the page:

Qualifications

School Year	Certification Level	Degree
2005 - 2006	Both	Master Degree (M.Ed., M.A., etc.)
2004 - 2005	Both	Master Degree (M.Ed., M.A., etc.)

If qualifications can be added, a [School Year](#) selector and an Add Qualifications button appear below the table:

Qualifications

No Qualifications found for this staff.

School Year Add Qualifications

Add Qualifications

1. Select the School Year, then click Add Qualifications. The Qualifications page appears:

Home > Staff > Emma Jones > Qualifications

Qualifications

School Year: 2005-2006 Fiscal Agent: 1 - ABILENE ISD

Texas Certification Level*	<input type="text" value="Choose"/>
Highest Degree Obtained*	<input type="text" value="Choose"/>
Highest Degree Description	<input type="text"/>
Years of Experience in Adult Ed in Texas*	<input type="text"/> (whole years only)

2. Select or enter required/desired information. Years of Experience in Adult Ed in Texas must be entered as a whole number.
3. Click Save and confirm your choice.

Edit Qualifications

You can edit the qualifications of only those staff members who have an employment record with the selected fiscal agent. If you cannot select a fiscal agent with whom the staff member has an employment record, you cannot edit the qualifications of that staff member.

1. Select a fiscal agent with whom the staff member has an employment record.
2. Click the School Year link that applies to the Qualifications to be changed, then click Edit.
3. Make the desired changes, then click Save and confirm your choice.

Staff Development Activities and Hours

All state-wide activities are entered by Texas LEARNS, TCALL or by the FLRC. Do not duplicate a state-wide activity even if it was held in your region. All regional activities sponsored by the GREAT Center will be entered by the GREAT Center. Do not duplicate regional activities.

It is the responsibility of the program to enroll its staff in the proper activity. The GREAT Centers input regional activities but do not enter staff or assign staff hours.

Directors, Supervisors, and Administrators Only

Search Activities

Follow these steps to search for activities:

1. Click **Staff Development** in the main menu. The **Staff Development Activities Search** page appears:

Home > Staff Development

Staff Development Activities Search

School Year and Reporting Year

2005-2006 Federal Reporting

Activity Name and Date

Activity Name Begin Date* End Date*

7/1/2005 6/30/2006

Search Add New Activity

2. Enter or select the desired search criteria.
3. Click **Search**. As soon as you select a school year and reporting year other than the default options or click Search, a list of the specified activities appears, displaying summary information about each activity:

Activity Name	Maximum Pre/In-Service Hours	Begin Date	End Date	Staff Enrolled (All FA's)
1Q-Fall inservice-COM	24.00	07/01/2005	07/01/2005	7
1q-pre service	12.00	07/01/2005	07/01/2005	2
2005-2006 Program Orientation	6.00	07/01/2005	06/30/2006	2
Accountability/TEAMS	3.00	07/01/2005	06/30/2006	6
Annas Preservice class	30.00	07/01/2005	07/30/2005	13

4. If you find the desired activity, click its name to view its details. See below for the edit procedure.

Add a Staff Development Activity

The Adult Education program sponsoring the professional development activity is responsible for entering any new activities. The activity name must be entered using the following standard:

Forthcoming Changes to TEAMS: Beginning in late spring 2014, The GREAT center regions will no longer be used. A new identifier will be used to name the professional development center.

- Use the following two-letter code identifying the GREAT region;

CE = Central	CO = Coastal
EA = East	FW = Far West
NO = North	SC = South Central

- Leave a space;
- three-digit code identifying the fiscal agent;
- leave a space;
- name of the PD event (the PD event name is the name you will use to search for later)
- Do not use dashes, hyphens or other symbols in the activity name .

For example, a workshop on teaching multi-level ESL, offered by Harris County, Department of Education in the Coastal area would be entered as: **CO 018 Multi Level ESL Instruction**

All state-wide activities are entered by Texas LEARNS, by TCALL, or by the FLRC. Do not duplicate a state-wide activity even if it was held in your region.

All Regional activities sponsored by the GREAT Center will be entered by that GREAT Center. Do not duplicate regional activities.

It is the responsibility of the program to enroll its staff in the proper activity. The GREAT Centers input regional activities, but do not enter staff or assign staff hours.

1. In the **Staff Development Activities Search** page, click **Add New Activity**. The Staff Development Activity Details page appears:

The screenshot shows a web form titled "Staff Development Activity Details". At the top right, there are "Save" and "Cancel" buttons. Below the title is a section labeled "Activity Information". The form contains the following fields:

- Organization***: A dropdown menu with "1" selected and a text box containing "ABILENE ISD".
- Activity Name***: A text input field.
- Description**: A large text area with scrollbars.
- Maximum Pre/In-Service Hours***: A text input field.
- Begin Date***: A date input field.
- End Date***: A date input field.

At the bottom right of the form, there are "Save" and "Cancel" buttons.

2. Select or enter required/desired information, noting the following:
 - All fields are required except Description.
 - Begin and End Dates must fall within a school year that is open for editing.
 - The Description text box is used to enter a brief description of the activity, including the location. It is important to note the activity location because the same activity may be repeated in multiple locations.
 - Do not use dashes, hyphens or other symbols.
3. Click Save and confirm your choice.

Edit a Staff Development Activity

You can edit only those Activities that someone at your user level entered for your Fiscal Agent.

1. Search for the activity as described above.
2. In the Activities list, click the Activity Name link.
3. To make changes to the descriptive data about the Activity itself, click Edit, make the desired changes, then click Save and confirm your choice. To add or edit Staff Development Hours, see [that section](#) below.

Delete a Staff Development Activity

You cannot delete a staff development activity for which any staff member has staff development hours, even for past years. Delete the staff development hours first, then delete the activity.

1. Search for the activity as described above.

2. In the Activities list, click the Activity Name link.
3. Click Delete, then confirm your choice.

Caution: After you confirm the deletion, the record cannot be recovered.

Display Staff Development Hours

You can add Staff Development Hours only for staff members who are employed by the selected Fiscal Agent. If you cannot select a Fiscal Agent for which the staff member has an employment detail, you cannot edit the staff member's development hours.

Staff members who have been inactive for two years or more before becoming active again in adult education must complete 6 hours of in-service professional development before being assigned to teach a class .

1. To display the current Staff Development Hours for an activity, search for the activity as described above. The Staff Development Hours appear in the middle of the page.
2. In the Activities list, click the Activity Name link. Staff development hours are listed in two tables, one for staff members who are associated with the default Fiscal Agent, and below that, another for staff members who are associated with any Fiscal Agent:

The screenshot shows a web interface for displaying staff development hours. At the top, there is a dropdown menu for 'Fiscal Agent' set to '1' and a text field for 'ABILENE ISD'. Below this is the heading 'Staff Development Hours' followed by a table with columns: Staff Name, SSN, Staff Development Type, and Hours Attended. The table contains one row: Administrator, Test, XXX-XX-6666, Pre-Service, 5.00. Below the table are 'Edit' and 'Add Staff' buttons. Underneath is another heading 'Staff Development Hours (All Fiscal Agents)' followed by a table with columns: Fiscal Agent ID, Fiscal Agent Name, Staff Name, SSN, Staff Development Type, and Hours Attended. This table contains one row: 1, ABILENE ISD, Administrator, Test, XXX-XX-6666, Pre-Service, 5.00.

Add/Edit/Delete Staff Development Hours

1. If you have access to multiple fiscal agents, select the fiscal agent for the staff member.
2. To add: Click **Add Staff**. The **Select Staff to Add to Activity** page is displayed.

Staff Development Hours			
Staff Name	SSN	Staff Development Type	Hours Attended
Staff, Five Years Exp	XXX-XX-7664	In-Service	8.00
Staff, New	XXX-XX-6778	In-Service	8.00
Staff, One	XXX-XX-7665	In-Service	8.00
Staff, TestFive	XXX-XX-2332	In-Service	8.00
Staff, TestFour	XXX-XX-2423	In-Service	8.00
Staff, TestOne	XXX-XX-8132	In-Service	8.00
Staff, TestSix	XXX-XX-2331	In-Service	8.00
Staff, TestThree	XXX-XX-1388	In-Service	8.00
Staff, TestTwo	XXX-XX-1213	In-Service	8.00

3. Select the staff name and then click the **Add Staff Hours** button.

Select Staff to Add to Activity

- Administrator Test XXX-XX-5748
- John Q. Test XXX-XX-0912
- Ariell Test XXX-XX-2744
- Susie Test XXX-XX-0723
- Lucas P. Test XXX-XX-3486
- Martha Test XXX-XX-2748
- Bobbie Test XXX-XX-5981

Forthcoming Changes to TEAMS:

Under TWC rules, staff must have six *in-service* hours. All pre-service activities will be in-service activities (40 Texas Administrative Code § 800.68).

4. Select the **Staff Development Type** from the drop-down list and enter the number of **Hours Attended**, and click Save.

Record Hours

Staff Name	SSN	Staff Development Type	Hours Attended
Staff, Five Years Exp	XXX-XX-7664	In-Service * ▾	8.00
Staff, New	XXX-XX-6778	In-Service * ▾	8.00
Staff, One	XXX-XX-7665	In-Service * ▾	8.00
Staff, TestFive	XXX-XX-2332	In-Service * ▾	8.00
Staff, TestFour	XXX-XX-2423	In-Service * ▾	8.00
Staff, TestOne	XXX-XX-8132	In-Service * ▾	8.00
Staff, TestSix	XXX-XX-2331	In-Service * ▾	8.00
Staff, TestThree	XXX-XX-1388	In-Service * ▾	8.00
Staff, TestTwo	XXX-XX-1213	In-Service * ▾	8.00
Administrator, Test	XXX-XX-6666	Choose * ▾	

To edit: Click the **Edit** link in the table for the staff development hours entry, make the desired changes, and click the Save button.

Additional Staff Development Hours for the same activity should be added to existing hours by editing the number of hours instead of adding a new record. See below.

Hours Attended for a Pre-Service Activity cannot be deleted or reduced below the level required to allow the staff to teach a class to which he or she is already assigned.

Similarly, if the Staff Development Activity to which the Staff was assigned needs to be changed to a different Activity, this cannot be done directly. First, add the correct Activity, then remove the Staff from the incorrect Activity.

If the Staff Development Type is Pre-Service, this cannot be changed to In-Service, nor can Hours Attended be reduced below 6, nor can the hours be deleted, if the Staff member is assigned to a Class that requires those specific Staff Development hours. If an error has been made, remove the staff member from the class, then make the required changes.

To delete: Edit the staff record and enter zero for the Hours Attended. Save changes.

Jump to Staff Details

To jump to the Staff Details for a staff member, click the Staff Name link in either table.

Class

Class Search and Entry

Directors and Supervisors Only

To begin working with classes, click **Classes** in the left menu. The Class Search page appears with a list of classes that match the default School Year :

Class Search

School Year: 2011-2012
Fiscal Agent: 1 ABILENE ISD

Class Information

Class Name: _____ Class Number: _____ Provider Name: _____ Site Name: _____
Class Begin Date between* 7/1/2011 and* 6/30/2012

*Click on column header to sort by ascending or descending. All - All Participants, Active - Active Participants.

Class Name	Class Number	Provider	Site	Begin Date	All	Active	Direct Hours	Proxy Hours
ALTAVISTA1	ESL1	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
ALTAVISTA2	ESL2	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
ALTAVISTA3	ESL3	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
ALTAVISTA-BEG.	ESL	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
AV ESL JULY SUMMER CLASS	ESL 0	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
AV PM ESL 1	ESL-I	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00
AV PM ESL 2	ESL-II	Abilene ISD	Alta Vista	7/1/2011	0	0	0.00	0.00

The number of classes displayed is limited to 100. To display a class not listed, enter search options to reduce the number of classes that match your criteria.

1. Select a different school year, if desired.
2. If you have access to more than one fiscal agent, select a different fiscal agent, if desired.
3. Enter or select the appropriate search criteria.
4. Click **Search**. As soon as you select a School Year and Reporting Year other than the default options or click Search, the Classes list is updated.

Add a Class

Enter Basic Classroom Information

Follow these steps to add a Class:

1. If you have access to multiple fiscal agents, select the fiscal agent for the class to be added.
2. Click **Add New Class**. The Class page appears:

Class
Fiscal Agent 1 - ABILENE ISO

Class Information

Class Number* Class Name*

Days Class Meets*

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Class Description (Class Time)

Site Name* Choose Coursework* Choose

State Initiatives*

No State Initiative
ABE/ASE Academy
Distance Learning
EL Civics Institute
ESL Literacy

Distance Learning Model Curriculum

Begin Date* End Date* Administrator/Coordinator

Class Type (Choose all that apply)*

ESL ABE ASE

3. Type the class number (required).
4. Type the class name (required).
5. Click in the boxes to select all days the class meets (required).
6. Type a description, including the time the class meets.
7. Choose the name of the site (required).
8. Choose the appropriate coursework.
9. Choose a **State Initiative**, if applicable (required).
10. If the class is a distance learning class, select the distance learning model.
11. If you selected a distance learning model, select the curriculum.
12. Type the beginning and end dates of the class (required).
13. Select the name of the administrator or coordinator.
14. Click the boxes for as many Class Types as apply (required).
15. Click **Save** and confirm your choice.

Assign Staff to a Class

To be assigned to a class, "Teacher" must be selected as the Primary Job or one of the Secondary Jobs in the Staff members' **Employment Details** page for an employment record whose date range covers the date range of the staff teaching date for the Class.

Follow these steps to assign a staff member to a class:

3. Click **Add Staff**. The Class Staffing page appears:

Home > Classes > ALTAVISTA1 > Class Staffing

Class Staffing

Class Information			
Name :	ALTAVISTA1	Number :	ESL1
Begin Date :	7/1/2007	End Date :	6/30/2008
Site & Provider			
Site Name :	Alta Vista	Provider Name :	Abilene ISD
Staff Teaching Date			
Staff Name*	SSN	Begin Date*	End Date*
<input type="text"/>	<input type="text"/>	<input type="text"/>	6/30/2008
<input type="button" value="Save"/>		<input type="button" value="Cancel"/>	

4. Select the name of the staff member or select the staff member by social security number.
5. Type the date the staff member will begin teaching, and if necessary, change the date the staff member will finish teaching. The **Staff Teaching Dates** must fall within the Begin and End dates of the class.
6. Click **Save** and confirm your changes.

Remove Assigned Staff from a Class

To remove an assigned staff member from a class:

1. Select the class.
2. Click the **View** link in the **Action** column of the **Assigned Staff** table for the class:

Assigned Staff

Last Name	First Name	Begin Date	End Date	Action
Salter	Gwen	7/1/2007	6/30/2008	View
Swain	Bronwyn	7/1/2007	6/30/2008	View
edit assignStaff	edit assignStaff	7/1/2007	6/30/2008	View

The Class Staffing page appears, with Edit and Delete buttons:

Class Staffing

Class Information			
Name :	ALTAVISTA1	Number :	ESL1
Begin Date :	7/1/2007	End Date :	6/30/2008
Site & Provider			
Site Name :	Alta Vista	Provider Name :	Abilene ISD
Staff Teaching Date			
Staff Name* SSN	Begin Date*	End Date*	
XXXX-XX-XXXX	7/1/2007	6/30/2008	
<input type="button" value="Edit"/>		<input type="button" value="Delete Staff"/>	

3. Click **Delete Staff** and confirm your choice.

View/Edit Class Details

To view or begin editing class details, click the class name link in the list. The Class page appears:

Class

- Days Class Meets is required.

Fiscal Agent 1 - ABILENE ISD

Class Information

Class Number* Class Name*

Days Class Meets*

Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Class Description (Class Time)

Site Name* Coursework*

State Initiatives*

Begin Date* End Date* Administrator/Coordinator

Class Type (Choose all that apply)*

ESL ABE ASE

Contact hours validated by

Director through: Not yet validated Supervisor through: Not yet validated

Assigned Staff

Last Name	First Name	SSN	Begin Date	End Date	Action
Johnson	Taylor	XXX-XX-XXXX	7/1/2011	6/30/2012	View
Johnson	Taylor	XXX-XX-XXXX	7/1/2011	6/30/2012	View
Johnson	Taylor	XXX-XX-XXXX	7/1/2011	6/30/2012	View

Contact Hour Periods

Month	Begin Date	End Date	Direct Hours
July	7/1/2011	7/31/2011	0.00

Follow these steps to edit basic class information:

1. Click **Edit** at the bottom of the first section.
2. Make the desired changes, noting the following:
 - Fields with a red asterisk (*) are required. If you clear them you will not be able to save your changes.
 - Distance Learning is new (see below)
 - Class Type is important for reporting:
 - ESL = English as a Second Language
 - ABE = Adult Basic Education
 - ASE = Adult Secondary Education
 - Begin and End Dates must fall within a school year that is open for editing.
 - Only Directors and Supervisors can validate class contact hour periods.
3. Click **Save** and confirm your choice.

Register a Participant for a Class

Participants are registered for classes through the [Participants](#) page.

Jump to the Participant Page

To jump to the Participant page for a participant in a class, click the participant's SSN link in the Registered Participants table.

Class Contact Hours

Staff /Supervisors

Class contact hours are associated with a contact hour period for a class, and with a participant. Therefore they cannot be entered until the class and the participant's class registration have all been entered. Users with the staff or supervisor role can enter and edit the number of contact hours. However, to change the funding source for a participant's class contact hours, you must have at least a supervisor role.

Enter Class Contact Hours

The **Contact Hours** column in the **Contact Hour Periods** table shows the total number of contact hours for all participants in the class contact hour period.

Follow these steps to enter class contact hours:

1. [View the Class Details.](#)
2. To enter or edit contact hours for a single day, select the day from the **Month** option list:

Contact Hour Periods

Month	Begin Date	End Date	Contact Hours
7/17/2007	7/1/2007	7/31/2007	42.00
July	8/1/2007	8/31/2007	0.00

7/10/2007 Choose Validate Invalidate

7/22/2007

7/24/2007

7/31/2007

participants

Participant Status Active

3. To enter or edit contact hours while viewing an entire month, click the **Contact Hours** link in the **Contact Hour Periods** table. The two views are shown below:

Monthly Contact Hours

Class Information

Fiscal Agent Name: ABILENE ISD	Site Name: Alta Vista
Class Name: ALTAVISTA1	Class Number: ESL1
Begin Date: 7/1/2011	End Date: 6/30/2012
Participants: 1	Average Daily Attendance: 0
Month: July	

Class Roster

Paper Size: Letter (8.5 X 11) Print With Hours Print Without Hours

Edit 7/1/2011 Add Day 7/4/2011 Remove Day

Participant Name	04	11	18	25	Month Total	Funding Source
Smith, Joe Trainer					0	English Literacy Civics Education
Day Total	0	0	0	0	0	

Daily Contact Hours

Class Information

Fiscal Agent Name: ABILENE ISD	Site Name: Alta Vista
Class Name: ALTAVISTA1	Class Number: ESL1
Begin Date: 7/1/2011	End Date: 6/30/2012
Class Date: 7/4/2011	

Class Roster

Save Cancel Next >>

SSN	Document Type	Document Number	Participant Name	Direct Hours	Funding Source
(None)	State Issued ID/TX Drivers License	5555555	Smith, Joe Trainer		English Literacy Civics Education

Save Cancel

4. Click **Edit** and make the desired changes to the participants' Contact Hours by typing directly into a cell. The total hours (direct plus proxy) cannot exceed 24 for a single day.
 - In the monthly view, use the **Add Day** and **Remove Day** buttons at the right to make those changes. If a day that you want to add is not available, you must assign staff to the class for the desired day, then return to this page.
 - In the monthly view, classes using a distance learning model will show a 'P' for each student to allow you to enter Proxy (distance) hours.

- In the daily view, use << **Previous** and **Next** >> to change to another day in the same month as listed in the **Month** list pictured in Step 2 above. (You cannot add days to the month in this page.)
- Missing boxes in a column mean the class meeting date falls outside that participant's begin and end date range for the class.
- The Hours cannot exceed the **Maximum Contact Hours**. In the monthly view, totals appear at the right and the bottom.

5. Click **Save** and confirm your choice.

Import and Export Contact Hours

If a class is open and already has some contact hours, you can export and import contact hours to and from an Excel spreadsheet.

Export Contact Hours

Follow these steps to export contact hours:

1. Select a class.
2. Under **Contact Hour Periods**, select the hours by clicking on the link under **Direct Hours**.

Contact Hour Periods

Month	Begin Date	End Date	Direct Hours
July	7/15/2011	7/31/2011	0.00
August	8/1/2011	8/31/2011	20.00

3. Click Export to Excel.

Monthly Contact Hours

Class Information

Fiscal Agent Name: ABILENE ISD	Site Name: Eastland Library
Class Name: Adult Reading Tutoring	Class Number: 111222333
Begin Date: 7/15/2011	End Date: 11/29/2011
Participants: 1	Month: August
Average Daily Attendance: 1 (5 / 5)	

Class Roster

Paper Size: Letter (8.5 X 11) | Print With Hours | Print Without Hours

8/4/2011 | Add Day | 8/1/2011 | Remove Day

Participant Name	01	02	03	08	09	10	15	16	17	22	23	24	29	M
Smith, Joe Trainer							4	5	4	6	1			20
Day Total	0	0	0	0	0	0	4	5	4	6	1	0	0	20

Excel: [Browse...] [Upload Excel] [Export to Excel]

Legend
 D - Direct Hours.
 P - Proxy Hours.

4. Click **Open**.
5. Select a location to save the file and click **Save**.

Import Contact Hours

Follow these steps to import contact hours from an Excel spread sheet.

1. Select a class.
2. Under **Contact Hour Periods**, select the hours by clicking on the link under **Direct Hours**.
3. Click the **Browse** button at the bottom of the page and find the file.
4. Click **Open**.
5. Click **Upload Excel**.
6. Click **Save** and confirm the changes. The page refreshes to show the new hours.

Validate Classes

To validate a class means to validate each Contact Hour Period for that Class. You can validate all of the Contact Hour Periods through the End Date of any selected Contact Hour Period for a Class. Repeat this process for each Class.

Follow these steps to validate:

1. [View the Class Details](#).
2. Decide which of the available months you are ready to validate.
3. Click the **Contact Hours** link in the row for that month to review its details.
4. Return to the **Class** page.
5. Select the desired date from the **Validate through** menu, and then click **Validate**:

Contact Hour Periods

Month	Begin Date	End Date	Contact Hours
July	7/1/2007	7/31/2007	90.00
August	8/1/2007	8/31/2007	30.00

Validate through*

Registered P

6.
7. Verify the results of your action in the **Contact hours validated by** section near the top of the page:

Contact hours validated by
Director through: 8/30/2006 Supervisor through: 8/30/2006

Invalidate a Class Contact Hour Period

You can invalidate one or more contact hour periods that have been validated. As with validation, you can only invalidate all contact hour periods from the beginning of a class through a certain date.

Follow these steps to invalidate a class:

1. [View the Class Details](#).
2. Decide how far back you want to invalidate validated contact hours.
3. Select the desired date from the **Validate through** menu, and then click **Invalidate**.
4. Verify the results of your action in the **Contact hours validated by** section of the page near the top.
You can neither validate nor invalidate contact hours for classes in a locked reporting year.

Participants

Participant Search and Entry

Various other records must have been entered into the system before you can create a new participant record. See the [Data Entry Sequence](#).

The **Participants** section of TEAMS is the core of the application, comprising these subsections:

- Personal Information: Personal identifying information
- Contact Information: Address and phone numbers
- Profiles: Services received from one or more fiscal agents; employment status; goals
- Classes: Classes for which a participant is registered, *Funding Source* (s), drop date
- Assessments: Tests, dates and scores
- Outcome/Gain: Comparison of before/after test scores, reported as movement among standardized levels in a *domain*

Searching for a participant and entering/editing participant demographic data are covered in this topic. Each of the other subsections is covered in a separate help topic.

In each of these subsections you may be able to view, add, or update the participant-related data, depending on your user role and access *level*

Search for a Participant

All Users

Before adding a participant, you are encouraged to search for the participant to avoid creating duplicate information. You will not be able to add a participant with the same SSN as another participant, but the system will not check the SSN for duplication unless you enter data for all required fields before clicking Save.

To search for a participant, start by clicking Participants in the left menu. The Participant Search page appears:

Participant Search

The screenshot shows a search form with the following fields and controls:

- Last Name:
- First Name:
- Middle Name:
- Date of Birth:
- SSN:
- And/Or:
- Document Type: (dropdown arrow)
- Document Number:
- City:
- Buttons: Search, Add New Participant

1. Enter your search criteria. To perform a search you must enter at least one of the following:

- Last Name
- Date of Birth
- Last four digits of the participant's social security number (SSN)
- Document Number and Document Type

You may enter the first few characters in every text field except the SSN, which requires a complete nine-digit number. The more search values you enter, the fewer participants will match all the criteria.

Other sample searches include:

- Participants with the same last name
- A specific participant by SSN, document type and number, or name
- All participants born on a certain date or residing in a specific city

To search by a document number other than SSN, select a **Document Type** from the list or enter the **Document Number** (which can contain letters). When entering a Locally Assigned Number, begin with the two or three-digit Fiscal Agent Number.

2. When you have entered the desired criteria, click **Search**. All matching participant records appear below the search area, with only the last four digits of the SSN visible:

Select the participant by clicking the link in the **SSN** column.

Add a New Participant

Program Staff and Above

Before adding a participant, you are strongly encouraged to search for the participant to avoid wasting time and creating duplicate information.

In addition, entry of a new participant record requires that various other records be entered already. See the [Data Entry Sequence](#) and [Record Type Dependencies](#)

1. Click **Add New Participant** in the **Participant Search** page. A blank Participant page appears:

TEAMS Home | Home > Participants | **Participant** | Assessments | Outcome/Gain | Summary

Personal Information

Last Name* | First Name* | Middle Name

SSN* | And/Or | Document Type* | Document Number*

Date of Birth* | Age | Gender* | Choose

Ethnicity* | Choose

Race (Check all that apply) *

American Indian or Alaska Native | Asian | Black or African American
 Native Hawaiian or Other Pacific Islander | White

Contact Information

Street Address

City* | State | Zip Code

TX | | |

Mobile Phone () | | | ext. |

Home Phone () | | | ext. |

Work Phone () | | | ext. |

Email |

Confirm Email |

Comments

(Not exceeding 500 characters)

Enter all available data. Each required field is identified by an asterisk (*). If you do not enter an SSN, you must enter both a Document Number and Document Type. A date of birth must be entered in mm/dd/yyyy format.

Participant Information

Field Name	Definition
Last Name	Last name of participant (required)
First Name	First name of participant (required)
Middle Name	Middle name or initial
SSN	Social security number (either SSN or Document Type and number are required)
Document Type	Alternative identification document type (required if SSN is not available)

Field Name	Definition
Document Number	Alternative identification number (required if SSN is not available)
Date of Birth	Participant's date of birth in MM/DD/YYYY format (required)
Age	<p>Years since participant's date of birth (computed from date of birth at save)</p> <p>NOTE: For Federal reporting purposes, the total number of learners by age is reported using the following age categories: 16–18 years, 19–24 years, 25–44 years, 45–59 years, and 60 years and older.</p>
Gender	Sex of participant (required)
Ethnicity	<p>Choose from the following (required:</p> <p>Hispanic/Latino—A person of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.</p> <p>Not Hispanic/Latino—A person who is not of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race</p>
Race	Check all that apply (required)
Contact Information	<p>Street address, City, Phone numbers, and Email addresses for participant. City is required.</p> <p>Email addresses much match.</p>

If the participant is 17 years old, parental permission and withdrawal from school must be documented.

If the participant is younger than 17 years old, you must note in the paper case file, the name and email address of a person who will verify that documentation is on file proving that the participant has been referred by a court order or another agency that has statutory custody of the minor.

Check **Do Not Release Directory Information** if this information should be kept private.

Select **Yes** or **No** to indicate whether to share data with the Texas Higher Education Coordinating Board or the Texas Workforce Commission.

Click **Save** and confirm your choice.

When you have entered all required information and all validation checks have been passed, if the participant is at least 18 years old, the application tries to match the participant to a person in the GED system. If found, the matching information appears in the GED Match section.

Edit Participant Data

If a participant match is found and the participant is being or has been served by another Fiscal Agent, the participant may attend classes in two or more different programs. If another Fiscal Agent has issued a “locally assigned number” to an undocumented participant, you should continue to use that same locally assigned number. Do not attempt to change a participant's locally assigned number.

Program Staff and Above

1. Retrieve the participant record by searching as described above.
2. Click the SSN link. The Participant page opens:

Participant

Assessments | Outcome/Gain

Personal Information
Last Name* First Name* Middle Name
SSN* And/Or Document Type* Document Number*
Date of Birth* Age Gender*
Ethnicity*
Race (Check all that apply)*
 American Indian or Alaska Native Asian Black or African American
 Native Hawaiian or Other Pacific Islander White
Contact Information ⊞

Fiscal Agent

Profiles

School Year	Education Level	Employment Status
2011 - 2012	Ninth Grade completed	Employed

School Year

Classes

No classes were found for this participant.

- To view contact information, click the expand button (⊞) in that section of the page. Click **Edit** to edit the profile.
- Select or enter all available information, noting the following:
 - Fields marked with a red asterisk (*) are required.
 - The Email Address and Confirm Email Address must contain the same address.
- Click **Save** and confirm your choice.

Delete a Participant

Program Staff and Above

You cannot delete a participant that has any associated records, even for past years. Delete the associated records first, then delete the participant.

- Retrieve the participant record by searching as described above.

4. Click the SSN link. The Participant page opens.
3. Click **Delete**, then confirm your choice.

Caution: After you confirm the deletion, the record cannot be recovered.

Participant Profiles

Program Staff and Above

A Participant Profile relates to a specific school year . If the current school year lacks a profile for the participant, a School Year selection list and an Add Profile button appear.

Add Participant Profile

Note : To see definitions for all of the Profile Variable options, see [Profile Variable Definitions](#).

To add a new participant profile:

3. Search for and select the participant.
4. If you have access to more than one fiscal agent, select the fiscal agent by select the number or name from the list.
5. Select the school year to which the profile applies.
6. Click **Add Profile**. The Profile page opens:

Profile

Save

Cancel

School Year: 2011-2012

Assessments | Outcome/Gain

Participant Status upon entry into the program	
<input type="checkbox"/> Disabled	<input type="checkbox"/> On Public Assistance
Type of Community* Choose	Employment Status* Choose
Hours Employed per Week (whole hours only)	Reason for not looking for work Choose
Other Status	
<input type="checkbox"/> Low-Income Status	<input type="checkbox"/> Displaced Homemaker
<input type="checkbox"/> Single Head of Household	<input type="checkbox"/> Dislocated Worker
<input type="checkbox"/> Learning-Disabled Adult	
For Corrections and Institutional Funded Program Participants Only	
<input type="checkbox"/> In Correctional Facility	<input type="checkbox"/> In Community Corrections
<input type="checkbox"/> Other Institutionalized setting	
In Specifically Designed Program Only	
<input type="checkbox"/> Family Literacy Non Even Start participant	<input type="checkbox"/> In Workplace Literacy Program(s)
<input type="checkbox"/> In Program for the Homeless	
Highest Education Completed*	In the US
Choose	
Profile Variables	
<input type="checkbox"/> On Parole	<input type="checkbox"/> On Probation (Community Supervision)
<input type="checkbox"/> Participant in Job & Training Program	<input type="checkbox"/> TANF Referral
<input type="checkbox"/> Expanded Eligibility for TANF	<input type="checkbox"/> One-Stop Center Referral
Optional Variables	

Participant Status upon entry into the program

Complete the following steps with regard to the participant's situation upon entry into the program:

3. Click **Disabled** if the participant is disabled.
4. Click **On Public Assistance** if the participant is on public assistance.
5. For **Type of Community**, choose **Rural** or **Urban** (required).
6. For **Employee Status**, choose **Employed**, **Unemployed looking for work**, or **Not in labor force** if the participant is not looking for work (required).
7. If the applicant is employed, type the number of whole hours worked per week.
8. If you picked **Not in labor force** for Step 7, choose a reason the participant is not looking for work. If you choose **Other**, type a short description of the reason.

9. Under **Other Status**, pick all of the status descriptions that apply to the participant.
10. If the participant is funded by a corrections or institutional program, pick **the one setting that applies**.
11. If the participant is enrolled in a specifically designed program, select one or more applicable programs.
12. Choose the highest *level* of education completed by the participant (required). You can only select **High School Diploma** or **College Degree** if you select **Outside the US** for Step 11.
13. Select whether that level of education was completed in or outside the US (required). This menu is not available if **Never attended school** was selected in the last step.

Profile Variables

Profile Variables	
<input type="checkbox"/> On Parole	<input type="checkbox"/> On Probation (Community Supervision)
<input checked="" type="checkbox"/> Participant in Job & Training Program	<input type="checkbox"/> TANF Referral
<input type="checkbox"/> Expanded Eligibility for TANF	<input type="checkbox"/> One-Stop Center Referral

The **Profile Variables** refer to eligibility and referrals for Adult Education programs. Choose all applicable **Profile Variables** by clicking the check boxes.

Optional Variables

Optional Variables	
<input type="checkbox"/> Homeless; served in Reg Adult Ed	<input checked="" type="checkbox"/> Immigrant
<input type="checkbox"/> WIA (formerly JTPA) Referral	<input type="checkbox"/> Family Literacy Challenge Grant Participant
<input checked="" type="checkbox"/> English Literacy & Civics Education Participant	<input type="checkbox"/> Parent of young child(ren) ages 0-5
<input type="checkbox"/> Parent of school child(ren) ages 6-10	<input type="checkbox"/> Parent of school child(ren) ages 11-13
<input type="checkbox"/> Parent of school child(ren) ages 14-18	<input type="checkbox"/> Other <input type="text"/>

If information is available, complete the Optional Variables:

1. Choose all applicable **Optional Variables** by clicking the check boxes.
2. If you check **Other**, you must enter a description in the text area provided.

Fiscal Agent

The Fiscal Agent information can be shared by all fiscal agents, but it can only be edited by the fiscal agent shown at the top of the section:

Fiscal Agent: 1 - ABILENE ISD

Contact Hours

Site: Orientation Hours: Direct Hours: Proxy Hours:

Notes:

Even Start Participant

Parent and Child registered in federally funded Even Start Program*

Participant Goals

Primary

Obtain High School Diploma Obtain GED
 Obtain a job Retain job or advance in job
 Enrollment in College or Other Training

Secondary

Leave Public Assistance Achieve citizenship skills
 Gtr Involvement in Children's Education Gtr Involvement in Children's Literacy Activities
 Gtr Involvement in Community Activities Register to Vote or Vote for First Time
 Improve Basic Skills Make Progress in English (LEP)
 Obtain U.S. Citizenship General Involvement (Volunteering)
 Obtain/Improve: Parenting Obtain/Improve: Health Care
 Obtain/Improve: Government and Law

1. Select the site where the participant is attending.
2. Type the number of **Orientation Hours**.
3. Indicate the site or class where orientation was held in the **Notes** field.
4. Select an option for Even Start participant (required). This option is read-only for programs that are not serving Even Start participants.
5. Select one or more **Participant Goals**. You must select at least one primary or secondary goal.
6. As the participant progresses, select one or more applicable **Participant Achievements**.
7. If the participant leaves the program, select a Separation Reason .
8. Click **Save** and confirm that you want to save the information.

View/Edit Participant Profile

Follow these steps to view or update a profile:

1. Search for and select the participant.

2. If you have access to more than one fiscal agent, select the fiscal agent by select the number or name from the list.
3. Select the school year to which the profile applies.
4. Click **Edit** and make your changes.

Click **Save** and confirm your selection.

Profiles from past years cannot be edited.

Some profile information is shared by all fiscal agents, but some of that shared information can be edited only by users associated with the fiscal agent that entered the information. This information appears in the [Fiscal Agent](#) section.

Delete Participant Profile

You cannot delete general information in a participant profile if it is being shared by another fiscal agent. If it is shared, you can delete only the information that is specific to your fiscal agent.

You cannot delete a participant profile that is associated with any Class Registrations. Delete all the associated class registrations, then delete the profile.

Follow these steps to delete the information in a participant profile that is specific to your fiscal agent:

1. [Search](#) for and select the participant.
2. Select the school year of the profile to be deleted.
3. Click **Delete**.

Caution: If in the next step you confirm the deletion of a participant profile and it is successful, the deletion cannot be undone. If you delete the wrong profile, the data will have to be re-entered.

4. Confirm your choice.
5. If a notification message appears, click **OK** again.

Assessments

Program Staff and Above

Assessments can be entered as soon as a participant's demographic data has been entered. Reading and writing scores are required.

See also Baseline Selection, Level Completions, and Gains

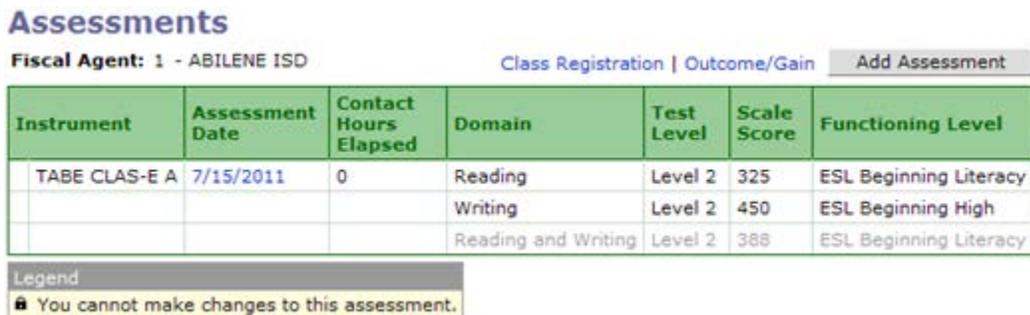
Pre-Registration Assessment

In order to register for a class, a participant must have an assessment. The assessment must belong to the instrument group selected with the class registration, and must be within 365 days before the participant's first contact hours in the class. The assessment can be completed on the same day as the first contact hours.

Add Assessment

Follow these steps to add an Assessment:

1. Retrieve the participant record by searching.
2. Click the **Assessment** link at the top of the page. The **Assessments** page opens:



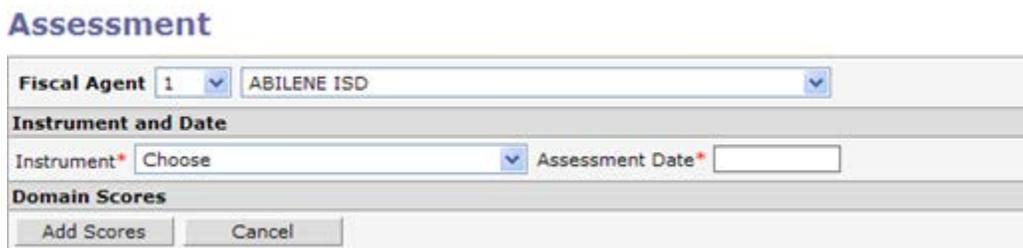
Assessments

Fiscal Agent: 1 - ABILENE ISD Class Registration | Outcome/Gain Add Assessment

Instrument	Assessment Date	Contact Hours Elapsed	Domain	Test Level	Scale Score	Functioning Level
TABE CLAS-E A	7/15/2011	0	Reading	Level 2	325	ESL Beginning Literacy
			Writing	Level 2	450	ESL Beginning High
			Reading and Writing	Level 2	388	ESL Beginning Literacy

Legend
🔒 You cannot make changes to this assessment.

3. Click **Add Assessment**. A blank Assessment page opens:



Assessment

Fiscal Agent: 1 ABILENE ISD

Instrument and Date

Instrument* Choose Assessment Date*

Domain Scores

Add Scores Cancel

4. Select an Instrument from the list:

Assessment

Fiscal Agent 1 ABILENE ISD

Instrument and Date

Instrument* Choose

Domain Score* Choose

Add Score

- BEST-B
- BEST-C
- BEST-D
- BEST Plus
- TABE CLAS-E A
- TABE CLAS-E B
- GAIN Form A
- GAIN Form B

To establish a Domain Functioning Level for federal reporting purposes, you must select one of the following assessments as a baseline: TABE 9 or 10, or BEST/BEST Plus. Other listed assessments are for local use only and are not recognized or allowed as baselines by federal guidelines.

5. Enter an Assessment Date in MM/DD/YYYY format. This date must be during a school year that is open for editing.
6. Click **Add Scores**. A scores table for the selected Instrument opens:

Assessment

Fiscal Agent 1 - ABILENE ISD

Instrument and Date

Instrument* BEST-B Assessment Date* 5/13/2011

Domain Scores

Domain	Test Level	Scale Score	Domain Functioning Level
Literacy	No Level	(0 - 78)	Not Applicable
Pronunciation	No Level	(0 - 999)	Not Applicable

Save Cancel

5. If applicable, select the **Test Level** for each domain.
6. Enter the **Scale Score** for each domain. The application calculates the Domain Functioning Level, if applicable. The application calculates the Reading and Writing and Listening and Speaking scores for TABE CLAS-E as follows:

Reading and Writing = Reading Score + Writing Score/2

Listening and Speaking = Listening Score + Speaking Score/2
7. Click **Save** and confirm your choice.

From this point you can go directly to the Class Registration page by clicking **Class Registration** in the upper right corner, or to the Outcome /Gains page by clicking **Outcome/Gains** next to Class Registration.

If you select a BEST or BEST Plus instrument and enter a score at its highest functioning level, you cannot use the assessment as a baseline for a Class because there will be no room for improvement. You will need to administer a TABE assessment.

Edit Assessment

1. Retrieve the participant record by searching.
2. Click the **Assessments** link at the top of the page. The Assessment list page opens:

Assessments

Fiscal Agent: 1 - ABILENE ISD Class Registration | Outcome/Gain [Add Assessment](#)

Instrument	Assessment Date	Contact Hours Elapsed	Domain	Test Level	Scale Score	Functioning Level
TABE CLAS-E A	7/15/2011	0	Reading	Level 2	325	ESL Beginning Literacy
			Writing	Level 2	450	ESL Beginning High
			Reading and Writing	Level 2	388	ESL Beginning Literacy

Legend
 You cannot make changes to this assessment.

5. Click the **Assessment Date** link of the desired Assessment. The Assessment page opens:

Assessment Class Registration | Outcome/Gain

Fiscal Agent 1 - ABILENE ISD

Instrument and Date

Instrument* TABE CLAS-E A Assessment Date* 7/15/2011

Domain Scores

Domain	Test Level	Scale Score	Domain Functioning Level
Reading	Level 2	325 (250 - 680)	ESL Beginning Literacy
Writing	Level 2	450 (200 - 730)	ESL Beginning High
Reading and Writing	Level 2	388 (225 - 705)	ESL Beginning Literacy
Listening		(230 - 710)	Not Applicable
Speaking		(230 - 678)	Not Applicable
Listening and Speaking		(230 - 694)	Not Applicable

[Edit](#) [Delete](#)

Domains that do not affect the calculation of Level Completions or Gains, and are not reported, appear in light gray text.

6. Click **Edit** and make the desired changes.

Click **Save** and confirm your changes.

For you to edit a BEST or BEST Plus Assessment that is being used as a baseline so that it shows a score at the highest functioning level, there must be another assessment which can provide a domain of significance . Otherwise there would be no room for improvement.

Delete Assessment

1. Retrieve the participant record by searching.
2. Click the **Assessments** link at the top of the page.
3. Click the **Assessment Date** link.
4. Click **Delete** and confirm your choice.

You cannot delete an assessment that is being used as a baseline for a Class Registration unless there is another assessment that can provide a domain of significance

Caution: If you confirm the deletion of an Assessment and it is successful, the deletion cannot be undone. If you delete the wrong Assessment, the data will have to re-entered.

Baseline Selection, Level Completions, and Gains

See the Assessments topic for information about pre-registration assessments.

Determining Baselines for Federal Reports

1. Within the specified Regular Adult Education reporting year, find the participant's first contact hours in any class . For state-wide purposes, consider classes from all fiscal agents. To report on an individual program, consider all assessments, but only classes belonging to that fiscal agent.
2. Find the last assessment in the selected *instrument* group (associated with the class registration) that occurs on or before the first contact hours date. This is the first contact hour assessment.
3. From the first contact hour assessment, consider a span of time from 30 days before the first contact hour assessment to 30 days after the assessment, but no later than 10 days after the first contact hours. This window allows for tests that are spread across multiple days.

Note:	Notice the change from the 14-day to 10-day rule. All assessments must be completed within 10 days of the first contact hours.
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4. For each *domain* in the selected instrument group, find the last assessment for that domain in the time frame described above. The domain with the lowest educational *functioning level* (ties broken by special rules) is the primary *domain of significance* (DOS), and the corresponding assessment is the primary baseline assessment.
5. The other domains are supplemental domains, and the last assessment in the window of time covering the domain is the baseline assessment for that domain.
6. If the participant is registered in later classes that use different instrument groups, an identical process is used based on the earliest contact hours in a class with that instrument group to determine the additional domain, additional baseline assessment, and any supplemental baseline assessments.

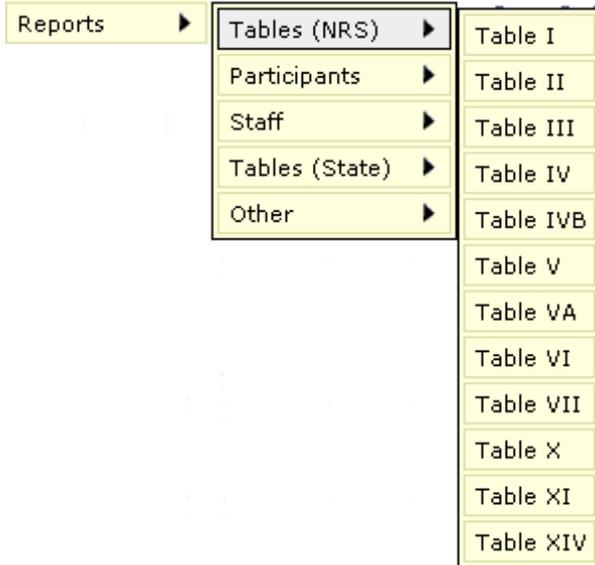
Progress Assessments

For federal purposes, progress is measured only from the baseline assessment in the primary domain. Baseline assessments in additional domains are included for state reporting purposes. Progress in supplemental domains is used only to determine a participant's gains.

Progress assessments must occur after the first contact hours date. Assessments within 10 days after the first contact hours date cannot be used to measure progress.

Reports Overview

All users may generate various reports by selecting an option from the **Reports** menu or its submenus, selecting inclusion/exclusion options, and then clicking **Run Report**.



Detailed steps are provided in each report help topic, under the categories (help books) Tables (NRS), Participants, *Staff*, Tables (State), and Other. However, the report options work the same way in every report and in fact are largely the same for all reports. Each report topic links back to its Description/Long Name in the table below, usually with identical wording.

Tables (NRS)

Report Short Name	Description / Long Name	Row and Column Headings
Table I	Participants by <i>Ethnicity</i> , <i>Gender</i> , and <i>Functioning Level</i>	ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High. American Indian or Alaskan Native, Asian, Black or African American, Hispanic or Latino,

Report Short Name	Description / Long Name	Row and Column Headings
		White, Native Hawaiian or Other Pacific Islander, male / female
Table II	Participants by Ethnicity, Gender and Age	Age groupings 16-18, 19-24, 25-44, 45-59, 60 and older. American Indian or Alaskan Native, Asian, Black or African American, Hispanic or Latino, White, Native Hawaiian or Other Pacific Islander, male / female
Table III	Participants by Age and Functioning Level	ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High. Age groupings 16-18, 19-24, 25-44, 45-59, 60 and older
Table IV	Educational Gains and Attendance by Educational Functioning Level. See also Other Reports below.	ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High. Total Number Enrolled (with Baseline Assessment), Total Attendance hours, Number Completed Level, Number Completed a Level and advanced one or more levels, Number who did not complete a level (number separated during the FY/Number remaining within level, percentage completing level
Table IVB	Educational Gains and Attendance for Pre- and Post-tested Participants	ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High.

Report Short Name	Description / Long Name	Row and Column Headings
		Total Number Enrolled Pre- and Posttested (with Progress Assessment), Total Attendance Hours, Number Completed Level, Number who Completed a Level and Advanced One or More Levels, Number Who Did Not Complete a Level (number separated before completed / Number remaining within level), percentage completing level
Table IVC	Educational Gains and Attendance for Participants in Distance Education	Educational Functioning Level at Start of the FY, Total Number Enrolled in Distance Education (with Baseline Assessment), Total Estimated and Actual Attendance Hours, Number Completed Level, Number Who Completed a Level and Advanced One or More Levels, Number Who did not Complete a level and Separated during the FY, Number Who did not Complete a level and Remaining within Level, % Completing Level
Table V	Core Follow-up Outcome Achievement	Entered Employment , Retained Employment, Obtained a GED or Secondary School Diploma, Entered Postsecondary Education or Training. Number of Participants with main or Secondary Goal, Number of Participants Included in Survey (Sampled and Universe), Number of Participants Responding to Survey or Used for Data Matching, Response Rate or Percent Available for Match, Number of Participants Achieving Outcome, Weighted Average Percent Achieving Outcome
Table VA	Core Follow-up Outcome Achievement for Participants in Distance Education	Entered Employment , Retained Employment, Obtained a GED or Secondary School Diploma, Entered Postsecondary Education or Training. Number of Participants with main or Secondary Goal, Number

Report Short Name	Description / Long Name	Row and Column Headings
		<p>of Participants Included in Survey (Sampled and Universe), Number of Participants Responding to Survey or Used for Data Matching, Response Rate or Percent Available for Match, Number of Participants Achieving Outcome, Weighted Average Percent Achieving Outcome</p>
Table VI	Participant Status and Program Enrollment	<p>Disabled, Employed, Unemployed looking for work, Not in labor force (not lknng for wk), On Public Assistance, Rural.</p> <p>Program Type (Family literacy program participant, Workplace literacy pgm participant, Program for homeless (only)).</p> <p>Institutional programs (In Correctional Facility , In community corrections program, Other Institutionalized setting)).</p> <p>Secondary Status Measures (Optional) (Single Head of Household)</p>
Table VII	Adult Education Personnel by Function and Job Status	<p><i>Administrator , Counselor, Director , Instructional Aide, Instructional Coordinator, Secretary or Clerical Staff, Teacher, Tester, Trainer, Other (non-instructional). Total Number of Part-time Personnel, Total Number of Full-time Personnel, Unpaid Volunteers</i></p>
Table X	Outcomes for Adults in Correctional Education Programs	<p>Completed an Educational Functioning Level, Entered Employment , Retained Employment, Obtained a GED or Secondary School Diploma, Entered Postsecondary Education or Training.</p> <p>Number of Participants with main or Secondary Goal, Number of Participants Included in Survey (Sampled and Universe), Number of Participants Responding to Survey or Used for Data Matching, Response Rate or Percent Available for Match,</p>

Report Short Name	Description / Long Name	Row and Column Headings
		Number of Participants Achieving Outcome, Weighted Average Percent Achieving Outcome
Table XI	Secondary Outcome Measures (Self Reported Data)	Left public assistance, Achieved citizenship skills , Increased involvement in children education, Increased involvement in children literacy activities. Number of Participants with Main or Secondary Goal or Status, Number of Participants Achieving Outcome, Percent Achieving Outcome
Table XIII	Core Follow-up Outcome Achievement for Prior Reporting Year and for Unintended Outcomes	Core Follow-up Outcome Measures, Number of Participants with main or Secondary Goal Who Achieved Outcome but Were Not Reported in the Prior Reporting Period, Number of Participants Achieving Outcome in Current Year Who Did Not Have the Outcome as a Goal, Entered Employment, Retained Employment, Obtained a GED or Secondary School Diploma, Entered Postsecondary Education or Training
Table XIV	Local Grantees by Funding Source	Local Education Agencies (Local Education Agencies), Public or Private Nonprofit Agency (Community-based organizations, Faith-based organizations, Libraries), Institutions of Higher Education (Community, Junior or Tech Colleges, Four-year Colleges or Universities, Other Institutions of Higher Education), Other Agencies (Correctional institutions, Other Institutions (non-correctional), All Other Agencies). Total Number of Providers, Total Number of Sub-Recipients, WIA Funding (total/percent of total), State Funding (total/percent of total)

Tables (State) Reports

Report Short Name	Description/ Long Name	Row and Column Headings
Participant Achievements	Number of participants with a goal or without a goal listed by educational functioning level	<p>ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High.</p> <p>Number of Participants Who Obtained GED or HS Diploma, Number of Participants Who Entered Post Secondary Education or Job Training, Number of Participants Who Obtained a Job, Number of Participants Who Retained Job or Advanced on the Job</p>
Participant Gains	Number of participants with both a pre and post test, listed by educational functioning level.	<p>ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL Advanced, ASE Low, ASE High.</p> <p>Number of Participants with Outcome (Progress Tested) (Tested with the TABE, Tested with the BEST, Tested with the BESTPLUS), Number Of Participants Who Took the TABE (Gained in Language, Gained in Math, Gained in Reading), Number Of Participants Who Took the BEST (Gained in Oral, Gained in Literacy), Number Of Participants Who Took the BESTPLUS (Gained in Oral)</p>
Participants with Less than 12 Contact	Number of participants with a baseline assessment and less than 12 hours issued	<p>ABE Beginning Literacy, ABE Beginning Basic Education, ABE Intermediate Low, ABE Intermediate High, ESL Beginning Literacy, ESL Beginning Low, ESL Beginning High, ESL Intermediate Low, ESL Intermediate High, ESL Advanced, ESL</p>

Report Short Name	Description/ Long Name	Row and Column Headings
Hours	by educational functioning level.	Advanced, ASE Low, ASE High. Total Attendance Hours for Participants with less than 12 Hours, Number of Participants with Baseline Assessment and less than 12 Hours
Performance Report	Performance Report	Performance Measures, Total Number Enrolled (with Baseline Assessment), Number Completed Level, % Completing Level Actual, % Completing Level Fiscal Agent Target, % Completing Level State Target by funding source.
Program Evaluation Report	Program Evaluation Report	Educational Functioning Level at Start of FY, Total Number Enrolled (with Baseline Assessment), Total Number Enrolled Pre- and Post-tested (with Progress Assessment), Total Attendance Hours, Number Completed Level, Number who Completed at Level and Advanced One or More Levels, Number Who did not Complete a level and Separated during the FY, Number Who did not Complete a level and Remaining within Level, % Completed Level Average Hours Per Participant, Follow-up Measures, Number with Goal, Number Enrolled in ASE, Number Enrolled in ASE with Goal, %Enrolled in ASE with Goal, % Enrolled with Goal, Number of Unemployed, Number of Unemployed with Goal, % of Unemployed with Goal, Number of Employed, Number of Employed with Goal, % of Employed with Goal
Staff Count By Employment Status	Staff Count By Employment Status	Job function, part-time count, full-time count, volunteer count

Report Short Name	Description/ Long Name	Row and Column Headings
Table IV and IVB Combined— Educational Gains and Attendance for Pre- and Posttested Participants	Educational Gains and Attendance for Pre- and Posttested Participants (Table IV and IVB Combined)	Listed by educational functioning level. Total Number Enrolled (with Baseline Assessment), Total Number Enrolled Pre- and Posttested (with Progress Assessment), Total Attendance Hours, Number Completed Level, Number who completed a level
Participants Tested under 60 Hours of Instruction	N/A	Participant Name, SSN, Document No., Pre Assessment, Date of Pre Assessment, Pre Assessment Fiscal Agent, Post Assessment, Date of Post Assessment, Post Assessment Fiscal Agent, Attendance Hours
Participants Tested with Less Than Minimum Hours of Instruction	N/A	Participant Name, SSN, Document No., Pre Assessment and Domain, Subject area tested by an assessment, Date of Pre Assessment, Pre Assessment Fiscal Agent, Post Assessment and Domain, Date of Post Assessment, Post Assessment Fiscal Agent, Contact Hours

Staff Reports

Report Short Name	Description/ Long Name	Row and Column Headings
Staff Address List	N/A	Staff Name, Address, Phone, E-mail

Report Short Name	Description/ Long Name	Row and Column Headings
Staff Address Mailing Labels	N/A	Formatted for labels.
Staff Development	Adult Education Staff Development Report (In-Service & Pre-Service)	Staff Name, Certification, Degree, Primary Job, Begin Employment Date in Texas, Latest Staff Employment Begin Date, Employment End Date, Prior Experience. <i>Activity Type, Staff Activity Name , Pre-Service Hours Attended , In-Service Hours Attended</i>
Staff Roster	Staff Roster Main	Staff Name, SSN, Primary Job, <i>Highest Degree Obtained</i> , Begin Employment Date in Texas Adult Ed, <i>Certification Level</i> , Number of In-service Hours Accrued to Date
Staff Without Qualifications	N/A	Staff Name, SSN, Primary Job, Highest Degree Obtained, Begin Employment Date in Texas Adult Ed, Certification Earned, Number of In-service Hours Accrued to Date, Required In-service Hours

Distance Learning Reports

Report Short Name	Description/ Long Name	Row and Column Headings
Curriculum by Fiscal Agent, Sites, Participants and Teacher	Curriculum by Fiscal Agent, Sites, Participants and Teacher	Curriculum, Number of Fiscal Agents, Number of Participants, Number of Sites, Number of Teachers
Participants by Contact Hour Range and Level Completion	Participants by Contact Hour Range and <i>Level Completion</i>	Contact Hours, Educational Functioning Levels Completed, Total (Percentage Completing Level)

Report Short Name	Description/ Long Name	Row and Column Headings
Participants by Educational Functioning Level and Contact Hour Range	Participants by Educational Functioning Level and Contact Hour Range	Educational Functioning Level at Start of the FY, Contact Hours, Total
Participants with Proxy Hours	Participants with Proxy Hours	Fiscal Agent Name, Total Number Enrolled (with Baseline Assessment and more than 0 proxy hours), Total Direct Hours, Total Proxy Hours, Total Orientation Hours, Total Hours

GED Reports

Report Short Name	Description/ Long Name	Row and Column Headings
GED Count with Educational Functioning Level	GED Count with Educational Functioning Level	Listed by educational functioning level. Total Number Enrolled with GED Goal, Total Attendance Hours with GED Goal, Total Number Achieved GED with GED Goal , Total Attendance Hours with GED Achievement, Weighted Average Percent Achieving Outcome
GED Match	N/A	Fiscal Agent ID, Participant Name, SSN, Date of Birth, Age, Functioning Level, Document No., Certificate ID, Issue Date, Goal, Goal <i>Length</i> , Achievement
GED Practice Test	GED Practice Test	Educational Functioning Level at Start of the FY, Total Number Enrolled took GED Practice Test, Total Attendance Hours took GED Practice Test, Total Number took GED Practice Test and achieved GED, Total Attendance Hours

Report Short Name	Description/ Long Name	Row and Column Headings
		took GED Practice test and achieved GED
Participants Achieved GED by Age and Functioning Level	Participants Achieved GED by Age and Functioning Level	Educational Functioning Level at Start of the FY, Participants Age at Time of Enrollment

Other Reports

Report Short Name	Description/ Long Name	Row and Column Headings
Average Daily Attendance	Average Daily Attendance	<i>Provider</i> Name, <i>Site</i> Name, <i>Class</i> Number, Class Name, Total Number Enrolled (with Baseline Assessment), Number Completed Level, Direct Hours, Proxy Hours, Total Attendance Hours, Number of Participants with Contact Hours, Number of Days with Contact Hours, Average Daily Attendance
Contact Hours LEA	Participant Contact Hours by School District (LEA) and Funding Source	County-District Number, District, Number of Participants, Contact Hours
Data Sign Off Status	Year to Date Summary of Data Sign Off Status	Fiscal Agent, Quarter, Funding Source, New Key Personnel Count, Is Report Submitted, Submitted Date
Individual Waiting List	Individual Waiting List	Last Name, First Name, Phone Number, Zip Code, Level
Non-Validated Classes	Non-Validated Classes	Fiscal Agent Name, Site Name, <i>District Number</i> , Class Number, Class Name, Latest Attendance

Report Short Name	Description/ Long Name	Row and Column Headings
		Hour Period End Date, Director Validated Date, Participants with Attendance Hours, Total Attendance Hours
Organization Waiting List	Organization Waiting List	Organization Name, ESL Count, ABE Count, ASE Count, Contact Last Name, Contact First Name, Contact Phone Number, Zip Code
Participant Count and Hours by Education Level	Participant Count by Hours and Education Level	Education Level, Total Number Enrolled, Total Attendance Hours
Participant Count and Hours by Separation Reason	Participant Count and Hours by <i>Separation Reason</i>	Separation Reason Total Number Enrolled, Total Attendance Hours
Participant Count and Hours By Site	Participant Count and Hours by Site	Site Name, Description, County-District Number, <i>District Name</i> , <i>Contact Name</i> , Address, Phone Number, Participant Count, Contact Hours.
Site and Provider Address Mailing Labels	Site and Provider Address Mailing Labels	Site Name, Address, City/State/Zip in label format.
Staff and Participants Count by FA	Staff and Participants Count by FA	Fiscal agent, Staff count, Participant Count
TANF Participants	Participants Funded By TANF	Fiscal agent, participant count, total attendance hours for selected period.
TANF—Welfare	TANF—Welfare to	Number of TANF clients served; number of attendance

Report Short Name	Description/ Long Name	Row and Column Headings
to Work Initiatives in Texas	Work Initiatives in Texas	hours for TANF clients; percent of TANF clients who took a progress assessment and completed at least one level; percent of those TANF clients completing at least one level who continued in the program, moving to a higher level; number of TANF clients who set a goal of obtaining a GED; number of TANF clients who completed the GED

Report Option Selection

After you select a report, select the desired options to include or filter (limit) the records as desired. Some selections widen your criteria, resulting in more records, such as selecting multiple Providers or Sites by holding down **Ctrl** while clicking. Other selections narrow your criteria, such as unchecking one more boxes in any section.

To appear in your report, a participant member needs to meet only one of the characteristics identified by check boxes in a section. However, the participant member must meet at least one of characteristics identified by check boxes in every section of the options page. Logically, the criteria are linked as follows:

If a given participant member (meets ANY of the criteria in the first check box section) AND (meets ANY of the criteria in the second check box section) AND ... then the participant member will appear in the report.

However, note that in the very first section (labeled simply "Options"), a participant must be registered for a Class matching ALL of the first three options (Reporting Year, Fiscal Agent, and Provider), and at least one of the selected Sites, to appear on the report. Participants must have at least one contact hour in the class.

In sections with check boxes, unchecking the **Select All** check box *deselects all the check boxes in the section*. At least one check box must be checked to generate a report. Each record matches at least one of the check box options, so leaving none selected would produce no records. Uncheck the **Select All** check box *only as a quick way to clear the check boxes before re-selecting a few of them*.

Almost always (aside from Reporting Year and Fiscal Agent), the default selection results in more records than any other selection. The instructions below assume that the default selection is not desired (you want to report only some of the records).

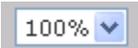
See the report topic for the specific report for more information about that report's options.

Crystal Reports Tool bar

When the first page of the specified report appears, use the Crystal Tool bar to perform the actions described below.

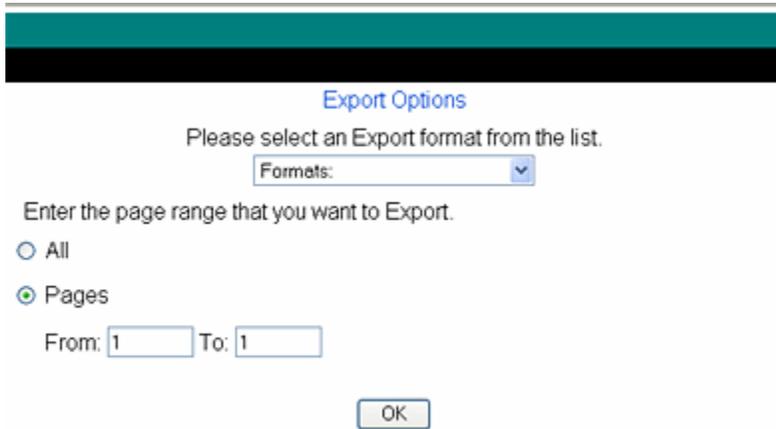


Task	Button	Additional Information
Export		<p>Opens an Export Options dialog where you can make additional selections to control the format of exported data (see below). Follow the on-page instructions in the pop-up window.</p>
Print		<p>Opens a Print the Report pop-up window where you can make additional selections to control the format of the printed report. Follow the on-page instructions in the pop-up window.</p>
Select report level		<p>Not applicable. The Main (Summary) vs. Detail selection is made before the report data is displayed.</p>
Go up a level		<p>Not applicable. There is always only one report level accessible in any given report. (To change levels, go back to the Report Selection page and select the desired report.)</p>
Go to first page		<p>Displays the first page of the report.</p>
Go to previous page		<p>Displays the previous page of the report.</p>
Identify the current page and page count		<p>Indicates what page of the report is currently being displayed and how many pages the report contains.</p>

Go to next page		Displays the next page of the report.
Go to last page		Displays the last page of the report.
Go to specified page		Enter the desired page number in the left portion of the control, then click the button to display that page.
Find text		<p>Searches for the specified text in the report, starting at the currently displayed page and searching to the end. Click the binocular button to find the next instance of the specified text.</p> <p><i>Note: Text in some reports contains non-breaking spaces. These appear the same on the web page as ordinary spaces, but they cannot be found through the use of this control. If you fail to find a phrase that should be present, try searching for only single words in the phrase.</i></p>
Zoom in or out		Changes the zoom level of the displayed report.

Export Report Data

Clicking the Export button opens an Export Options dialog where you can make additional selections to control the format of exported data:



1. Select the desired Export format from the drop-down list.
2. By default, the page range of the report in the Export dialog is 1 to 1, even if you were viewing a page number higher than 1 when you clicked the Export button. Type different page numbers to export a different range of pages.
3. Click OK to generate the export. This can take several seconds.

A file download dialog appears. Follow the prompts, which vary depending on whether you save or open the file. If your computer has the required software installed, the data appears in a viewer appropriate for the exported format.

If you choose one of the Excel export formats, the data is sent to a browser window with limited Excel functionality (assuming that you have MS Excel or the Excel Viewer installed). For best results, save the data to a file using *File > Save As...*, then use your spreadsheet program to open the file and edit the data as desired.

Print the Report

You must have the free Adobe Acrobat Reader software installed on your computer to use the Crystal Reports print function. If Acrobat Reader is not installed, a prompt appears during the procedure below, asking you if you want to install the reader. You must be logged in as an administrator of your computer to install the software. If you prefer, you can click the link above to visit the Adobe Acrobat Reader web page, read about the software, and install it from there.

Clicking the Print button opens a Print the Report dialog where you can make additional selections to control the format of the printed report.

1. By default, the page range of the report in the Export dialog is 1 to 1, even if you were viewing a page number higher than 1 when you clicked the Print button. Type different page numbers to export a different range of pages.
2. If your computer has Acrobat Reader installed, click OK to open the report using Adobe Acrobat Reader. If your computer does not have Acrobat Reader installed, you are now prompted to install it. Click Yes or OK to start this process. If other prompts appear as part of the installation process, read them and make the requested decisions regarding the license agreement, folder location and anything else that might apply to your computer's configuration.

The report appears in Acrobat Reader. Click the Print button in that application, choose a printer and other print options, and click OK.